CENTRAL MARKET/ TENDERLOIN STRATEGY

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Thank you to the Central Market Community Benefit District and the Tenderloin Health Improvement Partnership for being key partners in the Strategy update process.

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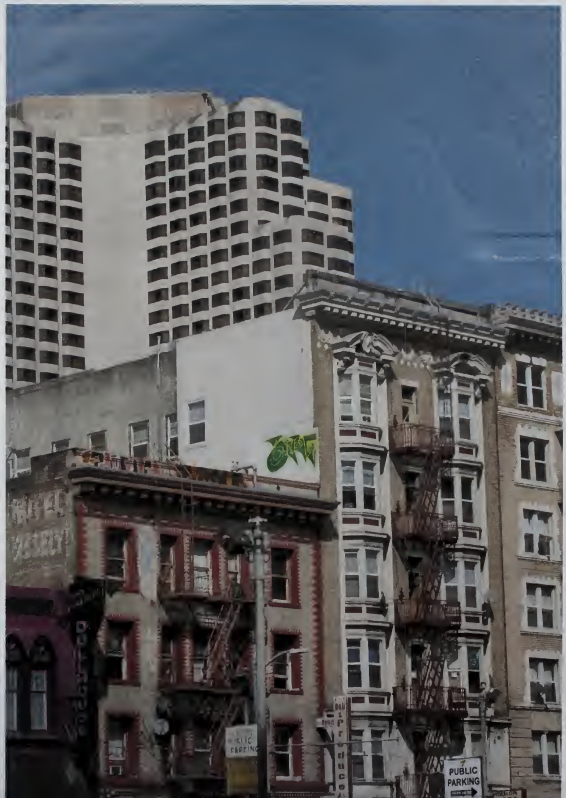
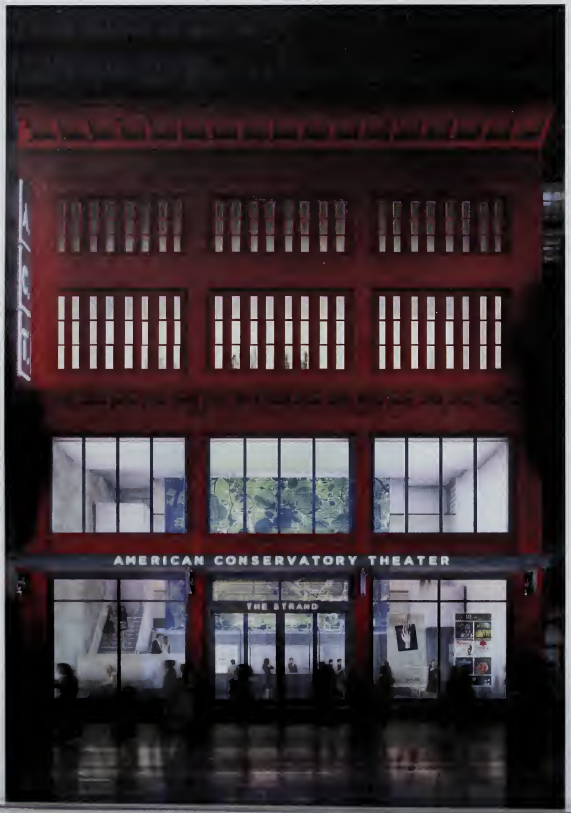


EXECUTIVE SUMMARY



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EXECUTIVE SUMMARY

SECTION 1: INTRODUCTION AND BACKGROUND

In late 2011, under the leadership of Mayor Ed Lee, the City and County of San Francisco launched the Central Market Economic Strategy (CMES). An anchor of the Mayor's Invest in Neighborhoods initiative, an interagency partnership managed by the Office of Economic and Workforce Development (OEWD) to strengthen and revitalize neighborhood commercial districts, the goal of the CMES was to coordinate public and private efforts and investment to revitalize the long-neglected stretch of Market Street between Fifth and Van Ness.

Since the original CMES was launched, it has effectively helped coordinate public and private investment along Central Market, initiating a transformation that has surpassed all expectations.

In 2014, OEWD, the Planning Department, and the Office of the City Administrator began a robust, year-long process to update the CMES in order to deepen and sustain the revitalization on Market Street, and expand its focus to the Tenderloin and Sixth Street. Towards the Mayor's goal of shared prosperity, the update process set out to solve three very different but concurrent urban planning questions: 1) What interventions are needed to create a *healthy, mixed-income neighborhood that offers safety and well-being to all people who live, work and visit* – especially a fragile low-income population that calls this area home? 2) How can San Francisco improve quality of life in a large area with such deeply ingrained challenges in a matter of years, not decades? and 3) How can the updated strategy be implemented in a way that promotes coordination and alignment among an ever-expanding list of public and private stakeholders looking to contribute?

The first section of this document details the progress along with the challenges still present in the neighborhood. It draws from the community feedback collected by the City in 2013 and data analysis, stakeholder feedback and other planning completed in 2014 to better understand the current neighborhood conditions. These community feedback and data collection efforts then informed the update process and development of this new Central Market/Tenderloin Strategy (Strategy).

WHO SHOULD READ THE STRATEGY

The Strategy was written for anyone who lives, works, or is interested in getting involved in Central Market and the Tenderloin. With an increasing amount of energy and resources focused on the neighborhood, the Strategy is meant to help a multitude of public and private stakeholders work together towards a common goal.

STRATEGY COMPONENTS

In order to incorporate a growing number of public and private stakeholders with diverse skill sets, resources, and needs the Strategy contains multiple layers and entry points for participation. The Executive Summary provides a high-level overview of the Strategy in order to breakdown the various Strategy components and to help everyone identify how they can join this collective neighborhood effort. Full analysis, explanation of the development process, and description of the specific proposed actions may be found in the full Strategy document and appendices.

HOW TO USE THE STRATEGY

Most importantly, this Strategy is meant for action. For instance: it can be used by an employer seeking employee volunteer projects; a small business looking to expand in the neighborhood; a non-profit undertaking placemaking activities; or philanthropic entities seeking to make an impactful investment. It will also be used by the City to ensure coordination among agencies and with outside partners. Section Three provides a list of specific activities and opportunities for involvement, which are divided into two types:

- **Place-specific activities** in nine "Action Zones." If you are interested in activities that improve specific places, these are the items to focus on.
- **Neighborhood-Wide activities** address issues that affect the neighborhood as a whole. If you are interested in issues such as housing, safety, small businesses, or arts, these are the items to focus on.

Once you determine which activities you are interested in each item is assigned to a City Subcommittee responsible for overseeing its implementation. City Subcommittee contact information is available at investsf.org/neighborhoods/central-market.

SECTION 2: STRATEGY FRAMEWORK

This Strategy proposes a new framework of activities that together will help achieve the goal of a healthy, mixed-income neighborhood. This includes: a) activities that provide resources to take care of low-income people; b) activities that bring in new economic investment to the area; and c) activities that ensure clean and safe shared spaces. The Strategy combines and coordinates these activities, prioritizing those that fall within more than one category and that are intentionally inclusive of the low-income community.

This Strategy further holds that the economic and cleanliness/safety interventions must be crafted intentionally to benefit and include low-income residents. Jobs for low-income residents will not simply materialize because new tech companies locate in the area. Unless deliberately inclusive, programming that makes a park or a plaza cleaner and safer may also exclude low-income residents.

Community Impact Framework

SECTION 3: STRATEGY APPROACH - ACTION ZONES, GAME CHANGERS AND NEIGHBORHOOD-WIDE OBJECTIVES

Once the Strategy Framework was solidified, an approach was required to translate its three priorities into on-the-ground actions. Following the work of community partners such as the Tenderloin Health Improvement Partnership (TLHIP) and based on significant community feedback, the resulting approach identifies nine Action Zones with place-specific Game Changers that will yield visible, near-term improvements:

- Action Zone A (Eddy and Leavenworth)
- Action Zone B (Eddy and Jones)
- Action Zone C (Golden Gate and Leavenworth)
- Action Zone D (Turk and Taylor)
- Action Zone E (Market between 5th and 7th)
- Action Zone G (UN Plaza and Civic Center Plaza)
- Action Zone G (Sixth Street)
- Action Zone H (Larkin Street)
- Action Zone I (Market and Van Ness)

The Strategy also proposes a number of Neighborhood-Wide Objectives, interventions that are not zone-specific but will support success in the Action Zones. These proposed interventions are organized by the following issue areas:

- Affordable housing
- Arts organization support
- Cleanliness
- Job opportunities
- Mental health
- Nonprofit retention
- Safety
- Small business support
- Streetscape improvements

Action Zone Map

SECTION 4: NEIGHBORHOOD PUBLIC REALM PROJECTS

A key element to updating the Strategy is a survey of the physical conditions of public spaces. Information collected from numerous City agencies and community stakeholders has led to further exploration of a more comprehensive, longer-term approach to streetscape and public realm improvements that will enhance quality of life and increase inclusiveness in the neighborhood. The full extent of these activities is described in the supplemental Neighborhood Public Realm Vision provided in Appendix G.

SECTION 5: STRATEGY IMPLEMENTATION

The previous sections describe what should be done to make Central Market and the Tenderloin a diverse, healthy, and sustainable mixed-income neighborhood. But to be successful, this Strategy must also delineate how those actions will be implemented. This final section outlines four tools for implementation.

- Epicenter SF: An online clearinghouse for neighborhood information can be found at epicenter-sf.org.
- City Subcommittees: Designated City representatives responsible for the implementation, evaluation, and external coordination of specific components of this Strategy.
- Inclusive Programming Organization: The proposed organization would partner with neighborhood organizations and businesses to host indoor and outdoor programs that engage a wide range of residents, employees and visitors, and that prioritize the inclusion of low-income community members.
- Data Collection and Publication: Regularly published Report Cards will document progress made in implementing the Strategy's proposed actions. The City subcommittees will be responsible for setting and reporting on programmatic progress. OEWD and the Planning Department, with assistance from the Department of Public Health, will also collect secondary data to track social and economic change in the neighborhood and in the Action Zones over time.

Tools for Implementation

APPENDICES

Supplemental information has been included in the appendices. The appendices include more detailed analysis (e.g. Appendix F: Baseline Neighborhood Conditions) and description of the Strategy development process (e.g. Appendix C: Community Engagement and Outreach). They also include materials that will be useful to reference during the implementation of the Strategy (e.g. Appendix A: Examples of Inclusive Programming and Appendix G: Neighborhood Public Realm Vision).

- Appendix A: Examples of Inclusive Programming, Activities and Business Types
- Appendix B: Tenderloin Health Improvement Partnership Overview
- Appendix C: Community Engagement and Outreach
- Appendix D: Implementation Tools and Subcommittee Assignments
- Appendix E: Neighborhood Report Card Template
- Appendix F: Baseline Neighborhood Conditions
  - Employment
  - Housing
  - Demographics
  - Real Estate
  - Quality of Life
- Appendix G: Neighborhood Public Realm Vision

SECTION 1.

INTRODUCTION AND BACKGROUND

INTRODUCTION AND BACKGROUND

In late 2011, under the leadership of Mayor Ed Lee, the City and County of San Francisco launched the Central Market Economic Strategy (CMES). An anchor of the Mayor's Invest in Neighborhoods program, an interagency partnership to strengthen and revitalize neighborhood commercial districts, the goal of the CMES was to coordinate public and private efforts and investment to revitalize the long-neglected stretch of Market Street between Fifth and Van Ness. City agencies then proceeded to engage private stakeholders – including community-based nonprofit organizations, arts groups, property owners, and small businesses – to direct attention to the corridor which had been neglected in the last economic boom despite its central location, beautiful historic buildings, and long-established arts venues. These stakeholders, soon joined by new tech companies and real estate developers, implemented programs focused on cleaning, safety, sidewalk activation, business attraction, and arts development. Most notable was the payroll expense tax exclusion offered to growing companies locating along Central Market and in the Tenderloin. This program led to the arrival of Twitter headquarters – and the subsequent emergence of the area as one of the region's major innovation hubs – and helped generate considerable momentum and new resources for neighborhood revitalization.

Central Market / Tenderloin Strategy Focus Area

By all accounts, the transformation along Central Market has been faster and more successful than most imagined possible. Since 2011, over twelve thousand new employees have come to work in the Central Market neighborhood at 17 newly located technology companies, two co-working facilities, and two venture capital firms. More than 5,600 housing units are now under construction or approved for the area, 20% of these permanently affordable, and another 4,000 units are proposed. Commercial office vacancy has decreased more than fourfold from 25% to 4%, there are more than 30 new storefront businesses and 13 new arts venues have opened in the neighborhood. The City and its partners helped relocate ten of these new venues from outside or elsewhere within the neighborhood in order to help them acquire stable, long-term real estate.

2013 COMMUNITY FEEDBACK

In 2013, the City conducted an evaluation to assess the Central Market Economic Strategy's impact on the area. Residents, small businesses, social service and housing organizations, and arts groups were surveyed about the changes occurring. These stakeholders reported enthusiasm for the progress along Central Market, the focus of political leadership on the area, and the new resources and noteworthy projects underway.

However, the evaluation also indicated ongoing frustration with the lack of safety, cleanliness, and positive activity on sidewalks and in plazas, as well as a desire for greater support in caring for the mentally ill. Neighborhood residents thought that the arrival of tech companies and real estate investment to Market Street should also lead to a cleaner, safer neighborhood for the primarily low-income population living north in the Tenderloin and south on Sixth Street (throughout the rest of the document these two areas adjacent to Market Street are referred to interchangeably). They hoped for better parks and infrastructure, and for new businesses that would increase the availability of healthy food, jobs, and affordable quality goods. While the initial CMES approached Market Street very much as a core downtown thoroughfare, it became increasingly clear that making meaningful, sustainable improvements benefiting neighborhood residents would require a different approach.

2014 CONDITIONS

Based on this feedback, and aligned with the Mayor's focus on shared prosperity, in 2014 the Office of Economic and Workforce Development's (OEWD) Invest in Neighborhoods team, the Planning Department and the Office of the City Administrator began a robust, year-long process to update the CMES. The 2014 update process began by gathering a variety of data to better understand the current economic, demographic, and physical make-up of the neighborhood and to establish a baseline for tracking future progress. The data confirmed the many challenges that Central Market and Tenderloin residents continue to face.

Central Market forms the spine of a very unique and challenged residential neighborhood that has long served people in need. A high concentration of residential hotels and social service facilities populate both sides of Market Street. According to the most recent data, detailed in Appendix F, nearly a third of households in the neighborhood make less than $15,000 a year; crime rates are three times higher than the city average; and almost half of all the City's homeless population lives in District 6, which includes Central Market and the Tenderloin. Many of the area's residents suffer from addiction and severe mental health issues and the streets in the neighborhood are some of the most dangerous for pedestrians citywide.

But despite its challenges, the neighborhood possesses many unique assets. There are approximately 4,600 families living in the area and twice as many children per square mile than the city as a whole; the density of seniors is even higher. A large cohort of Asian and Latino immigrants own small businesses that create an economic backbone for the neighborhood. The area also boasts strong coalitions of cultural institutions, health and social service organizations, and affordable housing providers. Many of these community organizations have roots dating back more than thirty years, and they succeeded in creating policies that have preserved much of the building stock in this part of the City for low-income housing and social services. Three-quarters of the Study Area's housing units are permanently affordable (24% compared with 4% citywide) or rent stabilized (54%) – substantially higher than other neighborhoods in San Francisco. Due to this fact, and because the area's large multi-family buildings are generally less prone to speculative real estate activity, this neighborhood has seen no increase in no-fault evictions between 2011 and 2013, while

the rest of the City saw the number increase by more than two and a half times. These conditions create a unique foundation on which a diverse and healthy low-income community can grow, and community-driven efforts to improve safety, access to healthy food, and parks continue to emerge from this neighborhood.

In 2014, new developers, tech companies, small businesses and arts groups continued to move in, eager to contribute to and invest in the neighborhood. An increasing number of improvement projects were also planned for the physical landscape. This confluence of energy, creativity and resources presented an opportunity to coordinate and leverage the efforts of public and private actors to better serve the neighborhood.

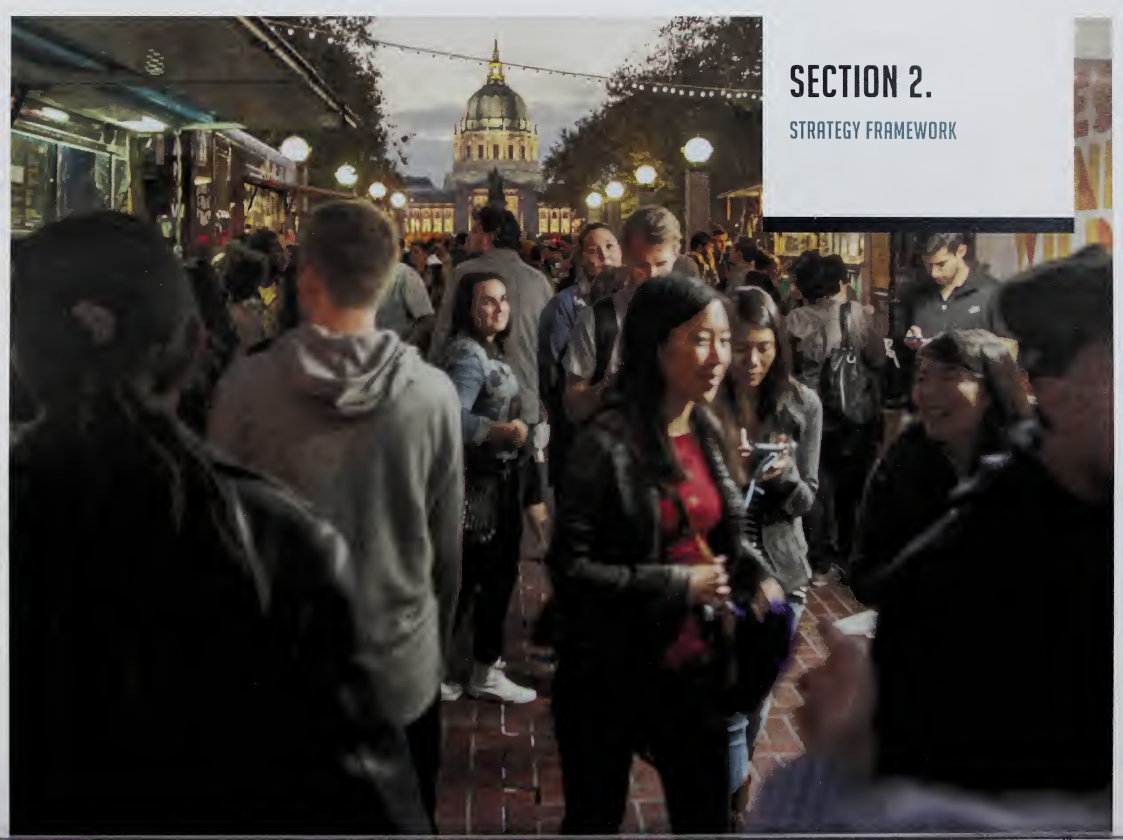
STRATEGY UPDATE

The 2014 update process documented the many public realm improvements planned or proposed for the area; engaged additional City agencies through the convening of a Central Market/Tenderloin Interagency Working Group; and conducted extensive community engagement including participation in numerous community planning processes, hosting or presenting at dozens of meetings, and conducting new focus groups and surveys. Appendix C further details these community engagement efforts.

This update process led to the inescapable conclusion that Central Market and the Tenderloin should be treated as a neighborhood, not a thruway. These areas are interdependent, face similar challenges, and have long deserved a better quality of life for their residents. They have also become both a literal and symbolic center of a city struggling with a growing economic divide. Residents and stakeholders have voiced a resounding commitment to ensuring that the area remains affordable and supportive of San Franciscans with substantial needs. There is optimism that the area's unique assets discussed above provide the opportunity to revitalize the neighborhood while ensuring low-income residents, including children, families, and immigrant business owners, can benefit from cleaner and safer streets, quality businesses, recreation, and other opportunities alongside newcomers.

The update process has culminated in the creation of this new Central Market/Tenderloin Strategy (Strategy) in 2015. To deepen and sustain the revitalization on Market Street, this Strategy is expanded to include priority areas along Sixth Street and in the heart of the Tenderloin. The new Strategy captures important work underway as well as identifies new interventions that are planned or needed, as determined during the update process. It also creates a much-needed structure for implementation that allows for increased coordination among the growing number of diverse public and private stakeholders, now and into the future. The goal is to harness new investment in the area to create a diverse, healthy, mixed-income neighborhood that offers safety and well-being to all who live, work and visit the area.

Tú Lan Updated Storefront



SECTION 2.

STRATEGY FRAMEWORK

STRATEGY FRAMEWORK

Goal: A diverse, healthy, mixed-income neighborhood that offers safety and well-being to all who live, work and visit Central Market and the Tenderloin.

This Strategy introduces a new framework to take on this ambitious goal. The framework proposes that to create a diverse, healthy mixed-income neighborhood, it is necessary to select, combine and coordinate activities and interventions that fall within three categories:

(1) Providing resources to take care of the low-income community;

(2) Creating new economic opportunities; and

(3) Promoting clean and safe shared spaces.

Community Impact Framework

LOW-INCOME COMMUNITY

For decades the Tenderloin and Sixth Street have been home to many of the City's most deprived – not just low-income residents, but the City's newest immigrants, its mentally ill and drug-addicted, its paroled and its homeless. The neighborhood offers state of the art supportive housing, and has generated important innovations in many areas of health and human services as well as philanthropy. Still, it's clear San Francisco can do more to take care of the people who make their homes or seek supportive services in the neighborhood. The City can provide greater opportunities for health and well-being beyond direct care and basic subsistence. While many of the challenges facing the area are much larger than the neighborhood itself, this Strategy does not recommend major changes to the citywide human services, health, education or criminal justice systems – there are other plans and initiatives that address these systems. Instead, it proposes discrete, feasible actions chosen to have an immediate, positive impact on low-income people in the neighborhood.

CLEAN AND SAFE SHARED SPACES

The primary hope of long-time residents for the neighborhood continues to be clean and safe shared spaces. This means that the parks, plazas, sidewalks, and community facilities need to be taken care of so that they can be accessed and enjoyed by everyone. A brand new park like Boeddeker is a shining example of what new investment and political will in the neighborhood can produce. But to remain a healthy community asset for the area, the park will require strong programming and sustained maintenance. Together with private stakeholders, the City can leverage the current momentum and new resources in the neighborhood to achieve this and similar goals.

ECONOMIC OPPORTUNITIES

This is the framework category where the greatest gains have been achieved to date; however, ensuring the sustainability of new small businesses, the completion of housing and arts development projects, and renewals of leases by new large employers in the area must remain a priority. Further, in parts of the neighborhood, new investment and corresponding opportunities are only just beginning to flow. It is critical that both the public and private sectors continue efforts to attract and sustain investment in the area.

INTERSECTIONS

This framework prioritizes activities that fall within the intersections between the three framework categories. These efforts generate important synergies, producing a total effect greater than the sum of the individual activities. For example, cleanliness and safety interventions targeted around a new small business cluster will not only promote positive street activity, thereby helping to support the small businesses, but also lead to improved neighborhood conditions. Similarly, a cleanliness intervention on a public plaza, such as a new staffed toilet service, will both enhance quality of life as well as provide greater dignity for the homeless.

This Strategy further holds that the economic and cleanliness/safety interventions must be crafted intentionally to benefit and include low-income residents. Jobs for low-income residents will not simply materialize because new tech companies locate in the area. Unless deliberately inclusive, programming that makes a park or a plaza cleaner and safer may also exclude low-income residents. As rents increase, businesses serving low-income residents and families may require strong incentives to locate or remain in the area. Please refer to Appendix A for examples of programming, activities and business types that may serve as a starting point for interventions that are intentionally inclusive.

There are very few cities that have effectively undertaken a revitalization effort like this one, where the goal from the outset is to create opportunities for the low-income community. There are even fewer success stories of mixed-income neighborhoods rising up where incomes are as disparate as in this neighborhood. To achieve these goals in the heart of San Francisco, this Strategy must find ways to foster social cohesion and a sense of belonging among people with starkly different incomes so that Central Market/Tenderloin feels like one shared neighborhood and not two different worlds. Developing shared spaces and reasons for people of diverse incomes and backgrounds to come together in them will create connection and ownership, and go a long way towards ensuring the sustainability of the interventions suggested throughout this Strategy.

SECTION 3.

STRATEGY APPROACH - ACTION ZONES, GAME CHANGERS, AND NEIGHBORHOOD-WIDE OBJECTIVES

Action Zone Map

Action Zone A: Leavenworth and Eddy

Action Zone B: Jones and Eddy

Action Zone C: Leavenworth and Golden Gate

Action Zone D: Turk and Taylor

Action Zone E: Market From 5th to 7th

Action Zone F: UN Plaza and Civic Center Plaza

Action Zone G: 6th Street

Action Zone H: Larkin Street

Action Zone I: Market and Van Ness

STRATEGY APPROACH - ACTION ZONES, GAME CHANGERS, AND NEIGHBORHOOD-WIDE OBJECTIVES

Once the Strategy Framework was solidified, the next step was to translate its three priorities into on-the-ground actions. The resulting approach was informed, in part, by the Invest in Neighborhoods initiative, which has effectively used customized, place-based techniques to support commercial corridors across the City. The Strategy's approach was also informed by significant community feedback and the work of community partners such as the Tenderloin Health Improvement Partnership (TLHIP) – a cross-sector initiative led by the Saint Francis Hospital Foundation, aimed at improving community health, safety and well-being in the Tenderloin. Appendix B includes more information about TLHIP and Appendix C describes the community engagement process.

The resulting strategy approach identifies nine Action Zones, prioritizing areas with both continued challenges and near-term opportunities. The approach then proposes place-specific Game Changers for each of the nine Action Zones. These place-specific, tangible interventions have the potential to align, leverage and coordinate activity to create a sense of action and momentum within a relatively short (two to three year) period. Some of the Game Changers represent activities already underway; others are newly proposed. As the selected zones improve, additional Actions Zones may be designated.

This approach also proposes a number of Neighborhood-Wide Objectives that are not zone-specific but necessary to support success within the Action Zones. These objectives include a set of near-, mid- and long-term physical improvements for the entire neighborhood, as well as Action Items that address neighborhood-wide issues around affordable housing, nonprofit and small business retention, cleanliness and safety. For example, while cleanliness and safety might ordinarily be considered very place-specific, a coordinated cleaning and safety team should be developed that can serve the entire neighborhood and move from Action Zone to Action Zone, or elsewhere, as needed.

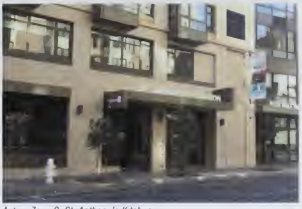
Each proposed activity, whether Game Changer or Neighborhood-Wide Objective, fits into one or more of the three framework categories: Low-Income Community, Clean and Safe Shared Spaces, and Economic Opportunities. Many fall within more than one category, fostering the important synergies described above. The remainder of this section contains the Game Changers and the Neighborhood-Wide Objectives in matrix form. The matrix includes a column with icons denoting the framework category. It also includes a column with the heading City Subcommittee. These City Subcommittees are an integral part of this Strategy's implementation toolkit that is described below in Section 5.

Action Zones and Game Changers

Game Changers	Action Items	City Subcommittee	Framework Categories
Action Zone A (Leavenworth and Eddy)			
Tenderloin Museum becomes a visitor destination and a hub for community activity.	Ensure Museum completes construction, develops engaging programs for a variety of participants, and is marketed as both a tourist destination and a centerpiece of community activity in the Tenderloin.	Arts and Culture	
A cluster of neighborhood-serving businesses develops around the Tenderloin Museum.	Engage landlords and attract targeted small businesses to fill vacancies and provide assistance to existing neighborhood-serving retailers to retain them.	Affordable and Healthy Goods and Services	
Action Zone B (Jones and Eddy)			
Boeddeker reopens as a clean and safe space.	Reopen Boeddeker Park. Maintain Park's scheduled hours. Implement initial cleaning and safety services in and around the park perimeter through partnerships with Rec and Park, SFPD and Office of Civic Engagement & Immigrant Affairs (OCEIA). Identify future safety and cleaning resources.	Boeddeker Park	
Boeddeker offers regular and special event programming.	Populate events calendar with diverse neighborhood events and activities daily. Identify future programming resources if needed.	Boeddeker Park	
Action Zone C (Leavenworth and Golden Gate)			
A zone of well-maintained storefronts of community-serving nonprofits is accompanied by efforts to promote positive, healthy activity on the sidewalk.	Align/modify existing programs (SF Shines, Mayor's Office of Housing and Community Development (MOHCD) resources and technical assistance) to incentivize physical improvements for nonprofit storefronts/ buildings and increased stewardship of surrounding sidewalks. This includes improvements, tenanting, co-location or programming that encourages sidewalk activation.	Affordable and Healthy Goods and Services	

Action Zone A: Tenderloin Museum

Action Zone B: Boeddeker Park


Action Zone C: St. Anthony's Kitchen

Economic Opportunities

Low Income Community

Clean + Safe Shared Spaces

Game Changers (cont'd)

Game Changers	Action Items	City Subcommittee	Framework Categories
Action Zone D (Turk and Taylor)			
A cluster of neighborhood-serving as well as entertainment-oriented businesses develops around the arts venues at Turk/Taylor.	Engage landlords and attract targeted small businesses to fill vacancies and provide assistance to existing neighborhood-serving retailers to retain them.	Affordable and Healthy Goods and Services	
New arts venues join existing venues to create a vibrant hub of cultural activity both during the day and nighttime at Turk/Taylor.	Support openings of PianoFight and Counterpulse and provide continued support to nearby venues. Leverage outside resources to create programming.	Arts and Culture	
New mixed-use development and existing buildings implement design strategies that contribute to a safe and active Turk and Taylor Streets.	Planning Department and Public Works continue to work closely with developers to ensure ground floor transparency and sidewalk improvements that contribute to safe, active and inviting pedestrian experience. Convert first blocks of Turk and Mason to 2-way, as part of the Better Market Street project.	Public Realm	
Action Zone E (Market from 5th-7th)			
Sustained sidewalk activation projects along Market from 5th-7th that promote positive day and nighttime activity are implemented while longer-term development progresses.	Continue to support and promote Make Your Market program, which offers streamlined permitting for vendors, musicians and artists on the sidewalks of Central Market. Continue to pursue design and installation of Living Innovation Zones in partnership with CBD's, local non-profits, companies, and other property owners. Engage local stakeholders in Market Street Prototyping festival to identify which installations and activation ideas best serve the residents, businesses and local organizations along this stretch of Central Market. City agencies offer support to Central Market CBD around temporary projects such as the arts barricade and evening arts walks.	Public Realm	

Action Zone D: Center for New Music

Action Zone E: The Hall

Game Changers (cont'd)

Game Changers	Action Items	City Subcommittee	Framework Categories
Action Zone F (UN Plaza and Civic Center Plaza)			
Civic Center Playground renovation is a catalyst for additional investment in the programming and stewardship of Civic Center Plaza. UN Plaza is activated with programming and art installations so it can become a cleaner, safer and inclusive community asset every day. Initial steps are taken towards linking the two plazas and activating/programming them as one vibrant civic space.	Complete playground renovation project and reopen it to the community. Planning assigns a Civic Center public realm planner to coordinate medium- and long-term improvements to both plazas and the larger area. Hire at minimum 1 Full Time Employee to head up programming/stewardship/safety coordination among the plazas and on Fulton Street. Recommend Full Time Employee be housed at Rec and Park. Increase programming/stewardship/safety capacity of Civic Center CBD and develop a partnership between the CBD and Rec and Park that augments programming at Civic Center Plaza initially and explores partnerships that also augment stewardship of UN Plaza and Fulton Street.	UN Plaza and Civic Center Plaza	
Action Zone G (6th Street)			
A cluster of neighborhood-and employee-serving businesses develops around the Sixth Street Safety Hub. Sixth Street Safety Hub becomes a visible hub of community-serving activity.	Engage landlords and attract targeted small businesses to fill vacancies and provide assistance to existing neighborhood-serving retailers to retain them. Maintain and augment public safety coordination and services, and other complimentary programming such as cleaning coordination out of the Safety Hub in order to maximize the site as a community asset.	Affordable and Healthy Goods and Services Sidewalk Safety and Cleaning	

Action Zone F: UN Plaza Night Market

Action Zone G: Sixth Street Safety Hub

Game Changers (cont'd)

Game Changers	Action Items	City Subcommittee	Framework Categories
Action Zone H (Larkin Street)			
Enhance visibility of Little Saigon as a Vietnamese-oriented cultural district.	Establish and support development of Little Saigon merchants association and the projects it pursues to promote the corridor, and provide focused business retention services to Larkin St. businesses.	Affordable and Healthy Goods and Services	
Create physical improvements that enhance the physical conditions of Larkin St. and also facilitate the connection to Market St.	Convene partnerships among City agencies, cultural institutions (Asian Art Museum) and local merchants to explore improvements to the pedestrian experience such as lighting, wayfinding and other low-cost place making opportunities. Identify new design opportunities through the Civic Center public realm planning process.	Public Realm	
Action Zone I (Market and Van Ness)			
A cluster of new resident and employee-serving businesses develops around new residential projects.	Engage landlords and attract targeted small businesses to fill vacancies and provide assistance to existing neighborhood-serving retailers to retain them.	Affordable and Healthy Goods and Services	
New residential developments at 12th and Market progress with designs that will contribute to an improved sidewalk experience.	Planning Department and Public Works continue to work closely with various developers and design teams to ensure ground floor transparency and sidewalk improvements that contribute to active and inviting pedestrian experience. Planning Department begins urban design work on Brady Block open space.	Public Realm	

Action Zone H: Larkin Street Storefronts

Action Zone I: 100 Van Ness

Neighborhood-Wide Objectives

Action Items	City Subcommittees	Framework Categories
Affordable Housing		
Ensure completion of pipeline (proposed and approved) affordable, public and market rate with on-site Below Market Rate (BMR) units projects in the neighborhood.	Housing Quality and Access	
Develop a pipeline for future acquisition opportunities that aligns with new City resources for new affordable, workforce, small site, or mixed-income housing development by identifying empty lots, vacant/underutilized buildings, poorly maintained private Single Room Occupany units (SRO), apartment buildings, or tourist hotels in the Tenderloin.	Housing Quality and Access	
Pursue additional daytime services for the homeless - in any part of the City - to help mitigate the negative sidewalk impacts of free food programs, personal sanitation, personal storage, etc. in the neighborhood.	Sidewalk Safety and Cleaning	
Conduct proactive outreach in the neighborhood by the Homeless Outreach Team in coordination with Office of Civic Engagement & Immigrant Affairs, Department of Public Works, San Francisco Police Department and other City on-the-ground resources as well as with Project Homeless Connect and private resources for homeless individuals and families.	Housing Quality and Access	
Develop a new transitional housing site that will serve more homeless APD clients and improve their transition into permanent housing placements.	Housing Quality and Access	
Augment /streamline and incentivize voluntary programs to provide training and technical assistance to SRO operators on health, housing, fire codes, and operations best practices.	Housing Quality and Access	
Continue efforts to expand baseline coordinated assessment infrastructure in order to place all homeless individuals (not just chronic) in appropriate housing depending on supportive service needs and to free up units for new clients, if possible. This includes maintaining an up to date list of SRO buildings for use by different City programs.	Housing Quality and Access	
Designate a psychiatric social worker to be available on call to health inspectors inspecting private SRO buildings.	Housing Quality and Access	
Explore additional recommendations supported by the Department of Public Health (DPH) Health Impact Assessment including: synthesizing enforcement efforts and data coordination among Department of Public Works (DPH), Department of Building Inspection (DBI), Planning, City Attorney, Human Services Agency (HSA) and Fire; dedicated fund for physical improvements to SROs; other incentives to enhance SRO operations; mandate a minimum standard of care for SRO operations.	Housing Quality and Access	

Neighborhood Wide Objectives (cont'd)

Action Items	Subcommittee	Framework Categories
Arts Organization Support		
Support neighborhood arts programming that attracts more residents, workers and visitors to existing and new arts venues.	Arts and Culture	
Continue providing real estate development and retention services to arts organizations in the neighborhood or those wanting to move to the neighborhood.	Arts and Culture	
Provide ongoing technical assistance around operations to ensure sustainability of neighborhood arts organizations.	Arts and Culture	
Cleanliness		
Continue Pit Stop toilet and make it available in other neighborhood locations as needed, and align Pit Stop with other public toilet facilities and resources.	Sidewalk Safety and Cleaning	
Pursue funding to staff around JC Decaux toilets 8 hours/day and lock them when they aren't staffed. Include UN Plaza, Civic Center Plaza, McAuley Park, and Boeddeker Park locations.	Sidewalk Safety and Cleaning	
Deploy new Outreach and Enforcement (OnE) Team to Mid-Market Corridor.	Sidewalk Safety and Cleaning	
Institutionalize the new Department of Public Works (DPW) position whose job is to align and coordinate cleaning, safety, homeless, and mental illness-related services together with community partners throughout the neighborhood, geographically deploying coordinated services or referrals as needed. Solidify partnerships with homeless services and mental health agencies.	Sidewalk Safety and Cleaning	
Increase the City's and community partners' capacity around sidewalk steam cleaning by providing direct assistance to neighborhood property owners around cleaning practices and by building CBD capacity for rapid response steam cleaning in the Tenderloin.	Sidewalk Safety and Cleaning	
Complete assessment and short-term plan to mitigate the number of discarded needles on the sidewalks and in public areas. Options could include increased educational resources, better signage for existing boxes, and additional needle dispensary boxes in strategic locations. Implement appropriate intervention with a focus on the Action Zones and in coordination with cleaning and safety interventions.	Sidewalk Safety and Cleaning	

Neighborhood Wide Objectives (cont'd)

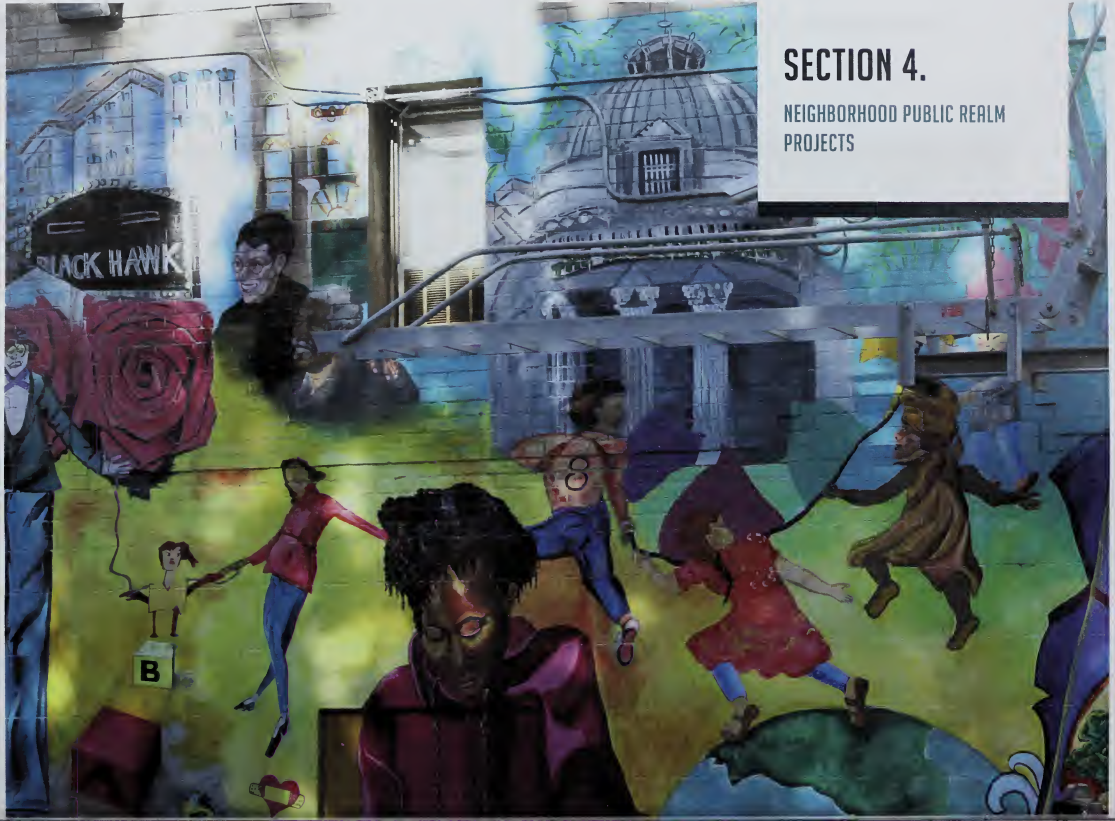
Action Items	Subcommittee	Framework Categories
Cleanliness		
Continue OCEIA Community Safety Ambassadors' presence on Central Market, Sixth Street and the Tenderloin and ensure coordination with other City agencies and Community Benefit Districts.	Sidewalk Safety and Cleaning	
Support community-based efforts to clean and initiate positive activation on sidewalks (e.g. Four Corner Fridays, Take Back the Block) with equipment/supplies, pro bono assistance, volunteers, and funding.	Sidewalk Safety and Cleaning	
Job Opportunities		
Pursue opportunities to develop or expand a sidewalk cleaning, safety ambassador, or similar program that hires formerly homeless or low income Tenderloin residents to participate in activities and programs aimed at improving the neighborhood.	Jobs and Training	
Assist new businesses, including retail and non-tech large employers, in hiring locally by providing coordinated recruiting and screening services through the JobsNow infrastructure and community partners, as well as assisting with First Source as appropriate.	Jobs and Training	
Explore establishment/expansion of a neighborhood lead organization, such as the Homeless Employment Collaborative, to better coordinate among service providers and to provide a go-to for recruiting and training candidates for primarily hospitality and retail positions in conjunction with City staff business representatives.	Jobs and Training	
Support and promote TechSF and other job readiness, training, and internship programs/partnerships that help tech companies hire local or low-income and diverse entry-level workers.	Jobs and Training	
Continue to administer Central Market/Tenderloin Payroll Tax Exclusion to help promote job growth in the area, and support implementation of Community Benefit Agreements.	Jobs and Training	
Mental Health		
Create a Tenderloin mental health resource team comprising a mental health clinician and a peer specialist. The team would be a resource on call for street outreach teams and other City or nonprofit social service providers in the neighborhood. The team would also provide training for OCEIA community safety ambassadors, Community Benefits District (CBD) ambassadors and crew, and Street Violence Prevention workers.	Sidewalk Safety and Cleaning	
Create a social day program for severely mentally ill individuals or those with dual mental illness and substance abuse diagnoses. Such a program would provide opportunities for socialization, recreation, life skills building, and vocational rehabilitation.	Sidewalk Safety and Cleaning	

Neighborhood Wide Objectives (cont'd)

Action Items	Subcommittee	Framework Categories
Nonprofit Retention		
Continue nonprofit facilities technical assistance services in the neighborhood, including accessing Nonprofit Stabilization Fund, Community Building Block Grant (CDBG), Complete Neighborhoods and other dollars/models in order to stabilize and upgrade nonprofit real estate in the neighborhood. Leverage opportunities for nonprofit co-location (i.e. multi-tenant building) and enhanced sidewalk activation.	Affordable and Healthy Goods and Services	
Safety		
Enhance Tenderloin Safe Passage program and pursue capital improvements marking the path; prioritize establishing safe passage for children, youth and seniors along routes to and from Boeddeker and to the Tenderloin Community School and connect to other public realm improvements.	Sidewalk Safety and Cleaning	
Facilitate coordination between SFPD and the Street Violence Prevention Program as needed.	Sidewalk Safety and Cleaning	
Continue proactive adult probation compliance checks in the Tenderloin while undertaking outreach to enroll probationers into Community Services and Assessment Center (CSAC) services. Pursue joint strategy with SFPD and Parole.	Sidewalk Safety and Cleaning	
Maintain the Mid Market Foot Beat; continue to increase the number of beat cops at Tenderloin station and ensure the police district redistricting will maintain or increase responsiveness in the Central Market/Tenderloin, including in the action zones.	Sidewalk Safety and Cleaning	
Pursue enforcement and policy options for "bad actor" properties that negatively affect sidewalk conditions.	Sidewalk Safety and Cleaning	
Embed Crime Prevention Through Environmental Design (CPTED) concepts into bricks and mortar enhancements and new construction.	Sidewalk Safety and Cleaning	
Small Business Support		
Assist affordable housing and nonprofit building owners in activating/maintaining affordable commercial space.	Affordable and Healthy Goods and Services	

Neighborhood Wide Objectives (cont'd)

Action Items	Subcommittee	Framework Categories
Small Business Support		
Continue to implement multi-lingual small business retention program – including lease/legal assistance, other technical assistance, financing, marketing assistance, and local purchasing partnerships with nearby companies – to ensure availability of quality affordable goods and services in the community. Also explore additional tools to assist with small business stabilization, including a fund for relocation and tenant improvements, master leasing to ensure long-term, affordable commercial space, and policy solutions to enable existing neighborhood businesses to stay and grow.	Affordable and Healthy Goods and Services	
Continue implementing and expand Healthy Retail SF corner store program and coordinate with adjunct healthy food resources such as EatSF pilot and Healthy Shopping Guide.	Affordable and Healthy Goods and Services	
Continue small business attraction and vacancy-filling activities with a focus primarily on Action Zones. Identify additional approaches – such as expedited permitting, piloting enforcement of the new DBI ordinance, and ensuring SF Shines has adequate capacity/resources – to attract a diverse, neighborhood-serving business mix.	Affordable and Healthy Goods and Services	
Streetscape Improvements		
Complete near-term (0-2 years) public realm projects that are currently funded and address issues of pedestrian safety, activation and place-making. See Section 4 for maps and project descriptions.	Public Realm	
Continue to support and coordinate among City agencies and community stakeholders to implement mid-term (3-5 years) public realm projects, which include larger scale urban design efforts, pedestrian lighting installation, and traffic calming measures. Pursue additional funding as needed to ensure completion of these projects. See Section 4 for maps and project descriptions.	Public Realm	
Pursue longer term streetscape and public realm improvements (5+ years) that will explore broader changes to the street system in support of Vision Zero as well as anticipated improvement of conditions on the sidewalks as new businesses and housing are integrated into the neighborhood. See Appendix for Public Realm strategy document.	Public Realm	



SECTION 4.

NEIGHBORHOOD PUBLIC REALM PROJECTS

NEIGHBORHOOD PUBLIC REALM PROJECTS

Another important dimension of this Strategy, working in parallel with the Neighborhood-Wide Objectives, is a survey of all of the neighborhood's public spaces and current physical conditions, and an accompanying exploration of opportunities to improve livability and inclusiveness within the public realm. This is a neighborhood that has not benefited from conventional urban design attention in the way that many other neighborhoods have in San Francisco.

A starting point for this exercise was to catalogue all of the public realm projects that are currently underway and planned for in the Tenderloin, Central Market, and Sixth Street (see Figures on pages 30 and 31). Collecting information from numerous City agencies and community stakeholders revealed the following:

- More than 20 near-term (within the next two years) public realm projects are currently underway in the neighborhood. These improvements address issues of pedestrian safety, sidewalk activation and place-making.

- Over the next three to five years, numerous additional public realm projects are proposed for the neighborhood, including larger urban design initiatives, pedestrian lighting installation and traffic calming measures.

- Some of these mid-term efforts will require additional funding and greater coordination to ensure they are completed in a way that supports and leverages Game Changers.

After mapping and analysis of these near- and mid-term projects, City agencies are beginning to explore a more comprehensive, longer-term approach to streetscape and public realm improvements in the neighborhood. This approach addresses broader changes to the street system in support of the City's Vision Zero pedestrian safety policy, which aims to eliminate all traffic deaths in the City by 2024. There will also likely be greater opportunities over time to implement urban design and place-making strategies in continued support of Game Changers and Neighborhood-Wide Objectives. When implemented, these strategies will lead to on-the-ground improvements in pedestrian safety, positive activation of public spaces, and an overall higher quality of life for residents. Please refer to Appendix G for the complete Neighborhood Public Realm Vision.

SIGNAL RETIMING
(NEIGHBORHOOD-WIDE)
GEARY ST
O'FARRELL ST
ELLIS ST
EDDY ST
TURK ST
GOLDEN GATE AVE
MCALLISTER ST
FULTON ST
GROVE ST
HAYES ST
FELL ST
OAK ST
MARKET ST
LARKIN ST
HYDE ST
LEAVENWORTH ST
JONES ST
TAYLOR ST
MASON ST
POWELL ST
CYRIL MAGNIN ST
POLK ST
VAN NESS AVE
GOLDEN GATE AVE
GOLDEN GATE AVE
A
B
C
D
E
F
G
H
I
BOEDEKER PARK
CIVIC CENTER PLAZA
UN PLAZA
MINT PLAZA
5TH ST
6TH ST
7TH ST
8TH ST
9TH ST
10TH ST
MINT ST
MISSION ST
HOWARD ST
NEAR-TERM PROJECTS (0-2 YEARS)
Action Zones
Golden Gate Ave Pedestrian Safety Improvements
Living Innovation Zones
+ Proposed
+ Planned
Market Street/UN Plaza Activization
Safer Market Street
Sixth Street Improvements
Vision Zero (Walk First) Pedestrian Safety Measures
Tenderloin Signal Retiming
Tenderloin Safe Passage
Tenderloin Safe Routes to School
UC Hastings McAllister Streetscape Plan

MID-TERM PROJECTS (3-5 YEARS)

- Action Zones
- Privately Sponsored Streetscape Projects
  - + 950 Market Street Streetscape Improvements
  - + Stevenson Alley Improvements
- Streetscape Projects
  - + Better Market Street Project
  - + Van Ness Bus Rapid Transit & Complete Street
  - + Polk Streetscape
  - + 6th Street Traffic Calming
  - + SoMa Alleys
  - + 2-Way Eddy and Ellis Streets (Phase 2)
- Tenderloin Pedestrian Lighting
- Green Connections
- Open Space Planning and Design Efforts
  - + UN Plaza Redesign
  - + Bradley Block Open Space Planning
- Civic Center Public Realm Plan

SECTION 5.

STRATEGY IMPLEMENTATION

STRATEGY IMPLEMENTATION

The previous sections describe what should be done to make Central Market, Sixth Street and the Tenderloin a diverse, healthy, and sustainable mixed-income neighborhood. But to be successful, this Strategy must also delineate how those actions will be implemented. This section outlines tools for implementation.

To be effective, the four implementation tools described below are multi-dimensional and foster connection and coordination among the diverse stakeholders in the neighborhood. They also include feedback mechanisms so that everyone involved in neighborhood projects can adjust or correct course when needed.

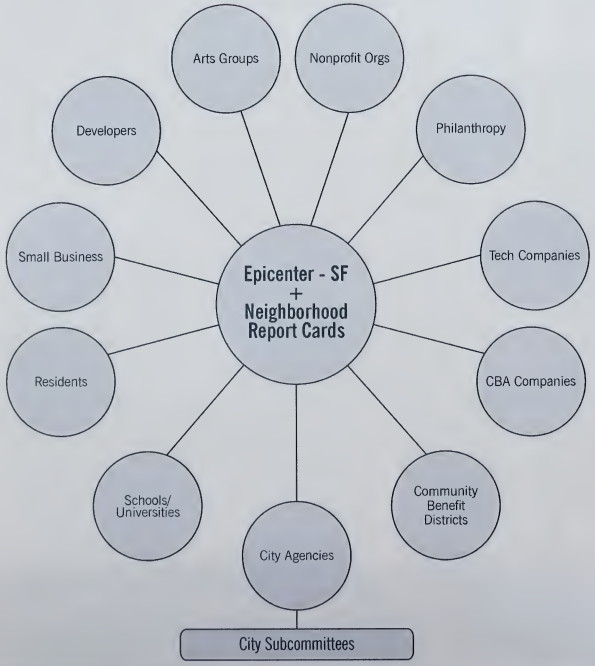
1. **Epicenter-SF:** The City and its partners are helping to plan and fund significant improvements to the Epicenter-SF website, an online tool that will enable information sharing among neighborhood stakeholders and visitors. The enhanced site will be a resource for anyone interested in getting involved or looking for information about the neighborhood. This could include tech companies that have signed Community Benefits Agreements and would like to take on volunteer projects that are part of this Strategy; businesses or residents new to the neighborhood looking for safety and cleaning resources; or nonprofit organizations looking to coordinate and publicize their neighborhood projects and programs. By serving as a clearinghouse for neighborhood information, Epicenter-SF will promote strategic investment and coordination of activities vital to the success of this Strategy. A beta version of the site (epicenter-sf.org) will be launched in Spring 2015.

2. **City Subcommittees:** In 2014, OEWD and the Planning Department formed an Interagency Working Group and organized City Subcommittees to provide a structure through which City agencies could work together on Game Changers and Neighborhood-Wide Objectives in an efficient, collaborative manner. Designated City agency liaisons will participate in regularly convened Subcommittees responsible for the implementation and evaluation of specific Strategy Action Items. These Subcommittees will coordinate with external partners regularly and will be accessible to the public via Epicenter, where they may post project information and a contact for public inquiry. They will report back to the larger Interagency Working Group at regular intervals. More detail on these subcommittees can be found in Appendix D.

3. **Inclusive Programming Organization**: The creation of truly shared spaces is no small feat. It will require new resources to develop and implement innovative events and programs that promote social cohesion among diverse users of the neighborhood. Recognizing that this capacity is key to the ultimate success of this Strategy, the City along with community partners will pursue additional funding to create an organization to help implement such activities. The organization will partner with neighborhood organizations and businesses to host programs that engage a wide range of residents, employees and visitors, and that prioritize the inclusion of low-income community members. It is important to note that the City itself does not intend to provide these services, but intends to foster the development of this unique skillset within the community. For examples of programs and activities that could be supported by this organization, see Appendix A.

4. **Data Collection and Publication:** Institutionalizing data collection systems and surveys will allow for ongoing, regular publications of Neighborhood Report Cards. The Report Cards will include data on conditions for the neighborhood as a whole and by zone, and will document progress made in implementing Game Changers and Neighborhood-Wide Objectives. See Appendix E for a template of the Neighborhood Report Card and Appendix F for a presentation of the baseline neighborhood conditions collected during development of this Strategy.

Tools for Implementation



EpiCenter-SF.org
EPICENTERSF
Your Community Calendar
and Directory for Events, Arts,
Culture, and Commerce
sfac
SAN FRANCISCO

APPENDICES

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Appendices can be found at: http://investsf.org/CMTLstrategy

APPENDIX A: EXAMPLES OF INCLUSIVE PROGRAMMING, ACTIVITIES, AND BUSINESS TYPES

INDOOR AND OUTDOOR PROGRAMMING AND ACTIVITIES

As described in the Community Impact Framework, all interventions must be crafted toward very specific needs in order to truly benefit low-income communities. Listed below are proposed ideas for indoor and outdoor activities that are inclusive of the low-income population, but also intended to promote cohesion in a neighborhood that is becoming increasingly diverse. A partial list, these are intended as a starting point for potential interventions.

Activities for Families

- Playgrounds
- Parks and gardens
- Interactive public art
- Free recreational and arts events (e.g. roller-skating)
- Chess
- Basketball
- Library

Activities for Adults

- Farmers Markets
- Sports games on the big TV in the plaza
- Movies
- Tai Chi
- Mah Jong
- Pianos

Activities for Adults, continued

- Dog Park
- Basketball
- Church events
- Freespace
- Neighborhood meetings/lectures

BUSINESS TYPES

Many of the Strategy's Game Changers and Action Items rely on attracting and retaining neighborhood-serving businesses. Below is a partial list of the kinds of affordable, neighborhood-serving businesses the City and its partners could prioritize:

- Taquerias
- Vietnamese sandwiches
- Pizza
- Bagels
- Donuts
- Ice cream
- Diners
- Dollar stores/discount stores
- Consignment stores
- Nail salons
- All purpose/general merchandise stores
- Banks or credit unions
- Healthy corner stores and grocery

APPENDIX B: TENDERLOIN HEALTH IMPROVEMENT PARTNERSHIP OVERVIEW

tenderloinhip
health improvement partnership

saint+francis
FOUNDATION

Tenderloin Health Improvement Partnership

Embracing Collective Impact to Improve Community Health, Safety and Well-being

The Tenderloin Health Improvement Partnership (Tenderloin HIP) is committed to significantly improving community health, safety, and well-being for the more than 33,000 individuals and families who live in the Tenderloin, one of San Francisco's most densely populated and challenged neighborhoods. Tenderloin HIP stakeholders have created a long-term vision of the Tenderloin as an inclusive, vibrant, and diverse community where health and safety are within the reach of all. Tenderloin HIP is working to align and leverage the efforts of more than 150 public, private, and nonprofit organizations to address the social, economic, and environmental determinants that contribute to poor health and chronic illness, while mitigating the underlying health disparities and inequities that persist in this neighborhood. Pursuing a place-based strategy that reflects the importance of these determinants in improving population health, Tenderloin HIP stakeholders recognize that the issues facing the Tenderloin are bigger than any one organization can solve on its own.

Spearheaded by Saint Francis Foundation and Saint Francis Memorial Hospital, Tenderloin HIP challenges its multi-sector partners to work better together within a collective impact framework - to proactively collaborate, expand and strengthen their network of cross-sector relationships and align to a common agenda. Positively disrupting organizational silos and operating modalities has been a hallmark of the work of Tenderloin HIP. Convening stakeholders and building consensus around community needs and priorities and making strategic investments has

fueled momentum and catalyzed change. Based on the model of the citywide San Francisco Health Improvement Partnership (SFHIP), Tenderloin HIP is the first neighborhood-specific coalition to pilot the vision and priorities of SFHIP.

A robust community stakeholder process initiated by Tenderloin HIP in late 2013 identified early on the priorities of safety, community connectedness and opportunities to make healthy choices as instrumental to realizing the residents' own vision of a safe and healthy Tenderloin neighborhood. These priorities resonated deeply across all stakeholder groups, enabling broad cross-sector commitment to the collaborative work of Tenderloin HIP. Engaged community-based partners represent the spectrum of agencies providing services vital to the Tenderloin community, including: Glide Foundation, St Anthony's Foundation, Bay Area Women's and Children's Center, Tenderloin Neighborhood Development Corporation, amongst many others. In the public sector, key Tenderloin HIP partners include the San Francisco Department of Public Health (DPH); Mayor's Office of Economic and Workforce Development (OEWD); Recreation and Parks; and the University of California, San Francisco. At the same time, Tenderloin HIP has challenged the funding community to invest in a pooled community fund to support Tenderloin HIP initiatives. PG&E; Citi Community Development; Wells Fargo; Twitter; the San Francisco Foundation; and Dignity Health have joined Saint Francis Foundation, Saint Francis Memorial Hospital and others as founding funders in this pool, which now totals over $1 million.

Core community priorities drove Tenderloin HIP's place-based strategy to identify four block areas, or "Action Zones" that provide a focal point from which healthy community activation can radiate throughout the neighborhood. The Action Zones have also been incorporated in the City's Central Market/Tenderloin Strategy, which looks to build upon the ongoing work of TLHIP and its partners.

Each Zone contains a community game-changer initiative, which Tenderloin HIP believes will have far reaching impacts on the overall health, safety, and well-being of Tenderloin residents.

Addressing the core conditions of safety, community activation, and stabilization in the Action Zones helps pave the way for Tenderloin HIP to dig deeper and confront the more complex community-wide challenges of mental health, crime and drugs, housing and gentrification, substance abuse and recovery, business and economy, resident leadership, and workforce development in the Tenderloin.

Tenderloin residents - individuals, families and those without shelter – are direct neighbors of Saint Francis Memorial Hospital and comprise the highest users of hospital services. Saint Francis Foundation and Saint Francis Memorial Hospital's commitment to the Tenderloin, through hospital and emergency care and community grants, has continued for over a century (currently $1 million per month in ongoing support); Tenderloin HIP is a natural extension of that commitment. Community investment will continue in 2015, including direct support to Tenderloin HIP and significant

investment in the backbone infrastructure needed to support this collective effort and facilitate continued community collaboration.

As momentum builds both locally and at the national level, 2015 brings new opportunities for funding and alignment. Tenderloin HIP's work continues – supporting community activation of the neighborhood, gathering street level data, developing healthy Action Zone pilots, convening working groups, advocating for health in all policies, evaluating impact, fundraising and more.

APPENDIX C: COMMUNITY ENGAGEMENT AND OUTREACH

Community engagement and outreach has been essential to every phase of the Central Market/Tenderloin Strategy, from inception to enquiry to drafting and finalizing this document. Over the course of two years, substantive community feedback has been solicited and incorporated from the diverse stakeholders representing both the "existing" and the "newcomer" fabric of the neighborhood, including people who live, work, own businesses, and visit the area.

Phase 1- Inception

The City began developing this Strategy in response to community feedback gathered during an extensive 10-month evaluation of the 2011 Central Market Economic Strategy. This public evaluation in late 2012 to mid-2013 utilized a "360 degree approach," designed to capture concerns and priorities for the Central Market area from a wide range of community stakeholders, including: an intercept survey of 220 pedestrians; a survey of 20 merchants; a survey of 169 Central Market residents living across the full spectrum of area housing types, including Tenderloin SROs; in-depth interviews with key stakeholder organizations and individuals; and four focus groups with arts organizations, social service providers, nonprofit housing organizations, and community benefit districts. The evaluation findings emphasized the need to expand upon current efforts in the neighborhood to more directly serve Sixth Street and the Tenderloin, and spurred the City to begin work on the Strategy.

Phase 2- Enquiry

Community engagement ramped up further as the City began shaping the new Strategy in 2014. To maximize stakeholder feedback and minimize the burden to the growing number of organizations and stakeholders now active in the neighborhood, the City sought to build upon and partner in existing community planning processes, by:

- Incorporating priorities and strategies from the Tenderloin Health Improvement Partnership (TLHIP), an effort led by the St. Francis Hospital Foundation that is bringing together Tenderloin community stakeholders to find new ways of working together to increase health and well-being. In 2013, TLHIP facilitated a community planning process that identified four "Action Zones" in the Tenderloin and prioritized safety and cleanliness as an initial focus for their funding as well as additional funding leveraged from outside sources. (For more information about TLHIP, see Appendix B.)

Through additional community engagement, this Strategy ultimately added five more zones to the four already identified by TLHIP.

- Partnering with San Francisco Beautiful and Neighborland to convene community partners, City agencies, and the public in early 2014 to prioritize interventions to improve conditions at UN Plaza. This process included a broad range of events, including two large community meetings and an intercept survey administered both in person and on-line to 200 respondents, many of whom were Tenderloin residents. Additionally, a Neighborland on-line voting process received more than 800 responses.
- Working with the City Administrator's Office on the 2014 Central Market Community Benefit Agreements planning process, including providing the nine Action Zones as a foundation to discuss neighborhood desires before drafting Community Benefit Agreements (CBAs). This process included an interactive community planning meeting with a diverse group of neighborhood stakeholders, as well as a large public meeting to gather input, all of which informed both the development of the CBAs and the content of this Strategy.

OEWD also held one-on-one or small group meetings with dozens of community-based organizations, including social service, nonprofit housing, and small business assistance organizations. Additionally, OEWD organized focus groups with small business assistance groups and CBDs (September 2014), tech companies (July 2014), and nonprofit arts organizations (November 2014). OEWD presented at the Central Market/Tenderloin Payroll Tax Exclusion Community Advisory Committee (September 2014) and at the Tenderloin Health Improvement Project (TLHIP) Community Advisory Committee (August and January 2014). OEWD and Planning also participated in more than 20 other public meetings, including the neighborhood's three Community Benefit District boards, the Tenderloin SRO Collaborative, Market Street for the Masses, Sixth Street Neighbors, and the Golden Gate Safety Group. The agencies convened a large multi-stakeholder community meeting with the Mayor's senior staff in October 2014 to preview and solicit feedback on initial elements of the emerging Strategy.

Phase 3- Drafting and Finalizing Strategy Document

After gathering community feedback for more than a year, in late 2014 and early 2015, OEWD and Planning synthesized the issues and ideas collected in to a Draft Strategy document. The Draft Strategy was presented at a large community meeting in January 2015 to solicit final feedback on its key elements. At the meeting, a survey was made available in multiple languages and was subsequently posted on-line at the Invest in Neighborhoods web site, investsf.org. Surveys were collected over the following month and reviewed in advance of finalizing this document.

APPENDIX D: IMPLEMENTATION TOOLS AND SUBCOMMITTEE ASSIGNMENTS

City Subcommittees

Each subcommittee listed below is tasked with the implementation and evaluation of the Action Items assigned to them in Section Three. Subcommittees will convene on a regular basis and will report on their progress via the *Neighborhood Report Cards*. Subcommittees will also be responsible for interacting with community stakeholders.

OEWD and the Planning Department will be responsible for the overarching coordination of the City subcommittees; however this implementation tool also requires the participation of many city agencies already working in Central Market and the Tenderloin. Some subcommittees are focused on a specific place (e.g. Boeddeker Park), while others focus on broader issues and objectives (e.g. Housing Quality and Access). In both cases, the subcommittee structure has identified where and how various City agencies overlap in order to create venues for efficient and effective coordination.

Affordable and Healthy Goods and Services

- Department of Public Health
- Mayor's Office of Housing and Community Development
- Office of Economic and Workforce Development
- Planning Department

Arts and Culture

- Arts Commission
- Asian Art Museum
- Grants for the Arts
- Office of Economic and Workforce Development

Boeddeker Park

- City Administrator
- Department of Children, Youth, and their Families
- Mayor's Safety Advisor
- Office of Civic Engagement & Immigrant Affairs
- Public Works
- Recreation and Park
- SF Police Department

Civic Center/UN Plazas

- Asian Art Museum
- City Administrator
- Department of Public Health
- Housing Opportunity, Partnerships & Engagement (HOPE)
- Office of Economic and Workforce Development
- Planning Department
- Public Library
- Public Utilities Commission
- Public Works
- Real Estate
- Recreation and Park
- SF Municipal Transportation Agency
- SF Police Department

Housing Quality and Access

- Adult Probation
- Department of Building Inspection
- Department of Public Health
- Housing Opportunity, Partnerships & Engagement (HOPE)
- Human Services Agency
- Mayor's Housing Advisor
- Mayor's Office of Housing
- Office of Economic and Workforce Development
- Planning Department

Jobs and Training

- Housing Opportunity, Partnerships & Engagement (HOPE)
- Human Services Agency
- Office of Economic Development
- Office of Workforce Development

Public Realm

- Mayor's Office of Civic Innovation
- Mayor's Vision Zero advisor
- Planning Department
- Public Utilities Commission
- Public Works
- SF County Transit Authority
- SF Municipal Transportation Agency

Sidewalk Safety and Cleaning

- Adult Probation
- City Attorney
- Department of Public Health
- District Attorney
- Housing Opportunity, Partnerships & Engagement (HOPE)
- Mayor's Safety Advisor
- Office of Civic Engagement & Immigrant Affairs
- Office of Economic and Workforce Development
- Public Works
- Public Utilities Commission
- Parole
- SF Police Department
- Street Violence Prevention

Additional Implementation Tools

The additional implementation tools, which are discussed in Section Five, will be overseen by the following agencies along with external funding partners:

- *Inclusive Programming Organization*: Office of Economic and Workforce Development
- *Report Card Publication*: Department of Public Health, Office of Economic and Workforce Development, and Planning Department
- *Epicenter-SF*: Office of Economic and Workforce Development

NEIGHBORHOOD UPDATE 2015

Framework and Evaluation Process

To track and evaluate the impact of the Central Market/Tenderloin Strategy, key indicators are paired with each of the Strategy Framework components depicted to the right. The first part of the Report Card – the **Neighborhood Update** – includes an analysis of these key economic and social indicators over time and compared to the City as a whole. This analysis is followed by a programmatic report on the work of City Subcommittees and external partners to implement the **Neighborhood Wide Objectives** set out in the Strategy.

The second section of the report card – the **Action Zone Update** – analyzes similar indicators at the Action Zone level, identifying important developments in the specific areas prioritized by the Strategy. This analysis is also followed by a programmatic report on the work of City Subcommittees and external partners to implement the **Game Changers** identified by the Strategy in each Action Zone.

Taken together, the components of this Report Card will help to evaluate progress, course-correct and identify futu actions towards achieving the Strategy's goal: a diverse, healthy, mixed-income neighborhood that offers safety ar well-being to all who live, work and visit Central Market a The Tenderloin.

Strategy Framework

2015 Neighborhood Highlights

[Key takeaways from the secondary data analysis included on the following three pages will be discussed here (e.g. a decrease in crime or vacancy or changes in the housing pipeline).

This section will create an entry point for readers as they digest the various graphs and charts that follow. It can also help to tie together the secondary data analysis with the programmatic reports that follow (e.g. there may be a decrease in pedestrian collisions due improvements to the public realm).]

Map of the Study Area

CONOMIC OPPORTUNITIES

mployment

Proposed Charts/Graphs

- *Growth in Employment*
- *Growth in Payroll*

Time period: 2011, 2013, 2015
Geography: Study Area and City

ource: Employment Development Department

Real Estate: Property Values

Proposed Charts/Graphs

- *Assessed Commercial and Residential Property Values*

Time period: 2011, 2013, 2015
Geography: Study Area and City

Source: San Francisco Assessors

eal Estate: Office and Retail Market Conditions

Proposed Charts/Graphs

- *Office Lease Rates & Availability*

Time period: 2011, 2013, 2015
Geography: Study Area and City

ource: CoStar

Proposed Charts/Graphs

- *Retail Vacancy Rate*

Time period: 2011, 2013, 2015
Geography: Study Area and City

Source: CoStar

LOW-INCOME COMMUNITY

Demographics

Proposed Chart

- *Population*
- *Race/Ethnicity*
- *Number of Children*
- *Concentration of families per square mile*
- *Households with income below $15,000/year*
- *Homeless Population*

Time period: 2010
Geography: Study Area and City

Source: 2010 Census, ESRI, San Francisco Point-in-Time Homeless Survey (2011, 2013)

Housing: No Fault Evictions

Proposed Graphs/Charts

- *No Fault Evictions per 1,000 housing units*

Time period: 2011, 2013, 2015
Geography: Study Area and City

Source: Department of Public Health

Housing: Affordability

Proposed Charts and Graphs

- *Current Housing Stock: Market Rate, Rent Stabilized, and Permanently Affordable*
- *Future Housing Stock: Under Construction, Approved, Proposed; Percent BMR*

Time period: 2011, 2013, 2015
Geography: Study Area and City

Source: City of San Francisco Planning Department

CLEAN + SAFE SHARED SPACES

treet Conditions

Proposed Graphs/Charts

- *311 Requests*

Time period: 2011, 2013, 2015
Geography: Study Area and City

urce: Department of Public Works

Pedestrian Safety

Proposed Graphs/Charts

- *Pedestrian Collisions*

Time period: 2011, 2013, 2015
Geography: Study Area and City

Source: Transbase, SF MTA

rime

Proposed Charts/Graphs

- *Crime Rates Per 1,000 Residents*

Time period: 2011, 2013, 2015
Geography: Study Area and City

urce: San Francisco Police Department

NEIGHBORHOOD WIDE OBJECTIVES

2015 Highlights: Complete Projects

Neighborhood-Wide Objective	Programmatic Report

2016 Priorities: Ongoing Projects

Neighborhood-Wide Objective	Programmatic Report

CTION ZONE UPDATE 2015

015 Action Zone Highlights

Key takeaways from the secondary data analysis at the Action Zone level, included on the ollowing page, will be discussed here (e.g. a decrease in crime or vacancy).

his section will create an entry point for readers as they digest the various graphs and charts hat follow. It can also help to tie together the secondary data analysis with the programmatic eports that follow (e.g. there may be a decrease in vacancies in a certain zone due to business ttraction efforts by a City Subcommittee and its partners).]

Map of the Study Area and Action Zones

ction Zone A: Leavenworth and Eddy

ction Zone B: Jones and Eddy

ction Zone C: Leavenworth and Golden Gate

ction Zone D: Turk and Taylor

ction Zone E: Market From 5th to 7th

ction Zone F: UN Plaza and Civic Center laza

ction Zone G: 6th Street

ction Zone H: Larkin Street

ction Zone I: Market and Van Ness

ACTION ZONE UPDATE 2015

Economic Opportunities

Proposed Charts and Graphs

- *Storefront Vacancy*
- *Employment*

Time period: 2011, 2013, 2015
Geography: Action Zones A-I

Source: Employment Development Departm

Low-Income Community

Proposed Charts and Graphs

- *SRO Housing Violations*
- *All Housing Violation*

Time period: 2011, 2013, 2015
Geography: Action Zones A-I

Source:

Clean and Safe Shared Spaces

Proposed Charts and Graphs

- *Crime*
- *311 Requests*

Time period: 2011, 2013, 2015
Geography: Action Zones A-I

Source: Department of Public

Source: San Francisco Police Department, Public V

GAME CHANGERS

015 Progress to Date

Zone	Game Changer	Programmatic Report
A	A cluster of neighborhood-serving businesses develops around the Tenderloin Museum.	
A	The Tenderloin Museum becomes a visitor destination and a hub for community activity.	
B	Boeddeker reopens as a clean and safe space.	
B	Boeddeker offers regular and special event programming.	
C	A zone of well-maintained storefronts of community-serving nonprofits is accompanied by efforts to promote positive, healthy activity on the sidewalk.	
D	New arts venues join existing venues to create a vibrant hub of cultural activity both during the day and nighttime at Turk/Taylor.	
D	A cluster of neighborhood-serving as well as entertainment-oriented businesses develops around the arts venues at Turk/Taylor.	
D	New mixed-use development and existing buildings implement design strategies that contribute to a safe and active Turk and Taylor Streets.	
E	Sustained sidewalk activation projects along Market from 5th-7th that promote positive day and nighttime activity are implemented while longer-term development progresses.	

GAME CHANGERS

2015 Progress to Date

Zone	Game Changer	Programmatic Report
F	UN Plaza is activated with programming and art installations so it can become a cleaner, safer and inclusive community asset every day.	
F	Civic Center playground renovation is a catalyst for additional investment in the programming and stewardship of Civic Center Plaza.	
F	Initial steps are taken towards linking the two plazas and activating/ programming them as one vibrant civic space.	
G	Sixth Street Safety Hub becomes a visible hub of community-serving activity.	
G	A cluster of neighborhood-and employee-serving businesses develops around the Safety Hub.	
H	Enhance visibility of Little Saigon as a Vietnamese-oriented cultural district.	
H	Create physical improvements that enhance the physical conditions of Larkin St. and also facilitate the connection to Market St.	
I	New residential developments at 12th and Market progress with designs that will contribute to an improved sidewalk experience.	
I	A cluster of new resident and employee-serving businesses develops around the new residential projects.	

APPENDIX F: BASELINE NEIGHBORHOOD CONDITIONS

MAY 2015

APPENDIX PURPOSE & OVERVIEW

The findings presented in this document are the result of significant analysis of on-the-ground conditions. In order to achieve a better understanding of the current state of Central Market and the Tenderloin, quantitative data across various categories were compiled and analyzed. The year 2013 serves as a baseline year to assess progress over time. Collecting the same data points in the future will help to understand the impact of the actions proposed in the Strategy. Comparisons are made between 2011 and 2013 in an effort to characterize the changes in the neighborhood since the publication of the original Central Market Economic Strategy.

The purpose of this appendix is show the most pertinent data points gathered during the analysis, including:

1. Employment and employment change, which are a proxy for the overall economic health of the neighborhood compared to the City overall.

2. Housing and housing affordability in the neighborhood was extensively examined to begin tracking potential displacement and loss of affordable housing in this historically low-income neighborhood.

3. Demographics were used to identify low-income populations, family characteristics, and the distributions and densities of homeless individuals living in the neighborhood.

4. Real estate trends for office, retail, and housing conditions were included to understand changes in investment in the neighborhood and the extent to which employment and housing growth is boosting local retail sales and property values, and the fiscal impact of that growth.

5. Quality of Life Metrics were gathered to understand the day-to-day conditions in the neighborhood for residents and workers. While no measure fully encapsulates quality of life, the analysis uses crime reports, street cleaning data, and pedestrian accidents to understand how on the ground conditions are changing over time. The indicators evaluated are public realm issues that have the potential to impact quality of life for all residents and workers in the neighborhood.

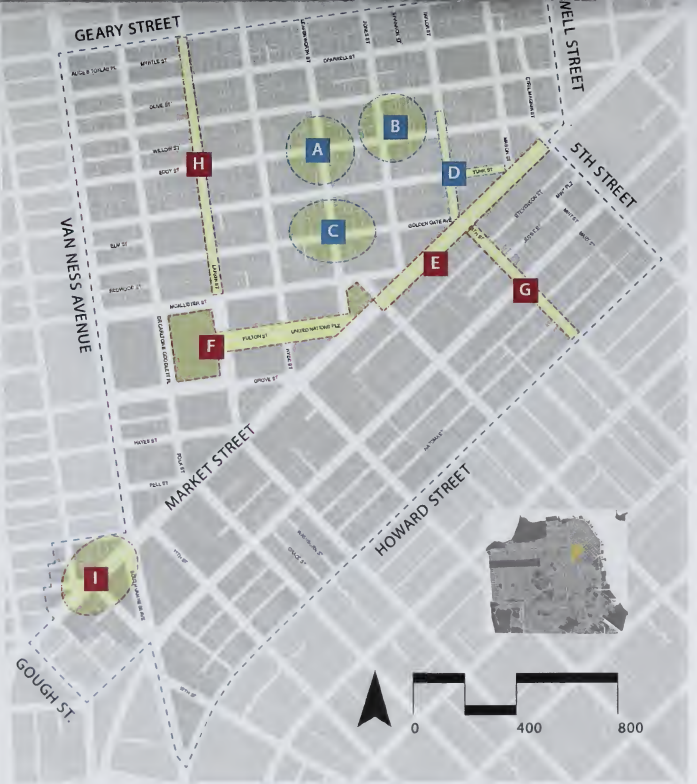
GEOGRAPHIES

Three scales of analysis were developed to understand the baseline neighborhood conditions:

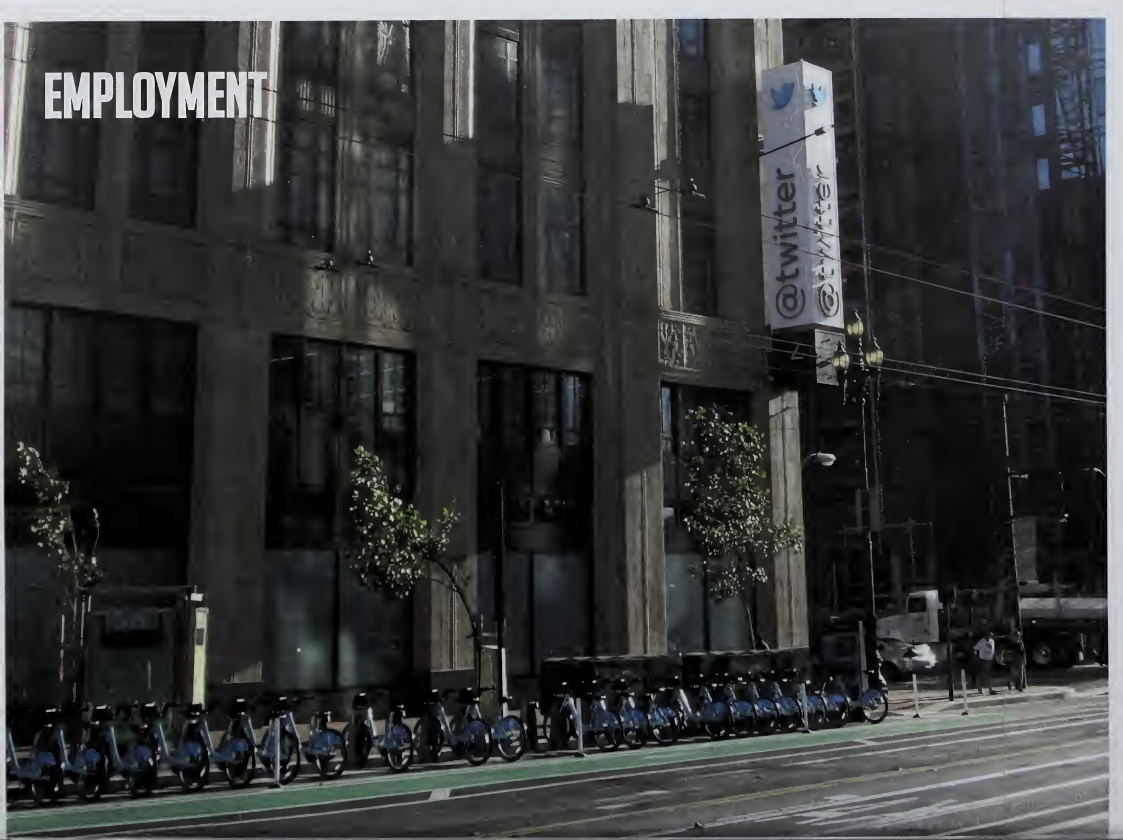
- The City
- The Study Area (blue dotted line)
- The Action Zones (yellow areas)

The majority of this baseline analysis uses the City as a comparison point to the Study Area. The Study Area was informed by the focus area of the 2011 Strategy and slightly recalibrated to account for changes in the neighborhood.

The Action Zones were used in the development of the actions proposed in the Strategy and will be used in ongoing evaluation efforts published via the report card template described in Appendix E. In many cases, data evaluated at the Action Zone level will only look at a couple of community indicators because the actions proposed in a given zone are focused on specific impacts (e.g. sustained programming at Boeddeker Park leads to a reduction in crime in Action Zone B). See section 3 of the main report body for further information on selection of Action Zones.



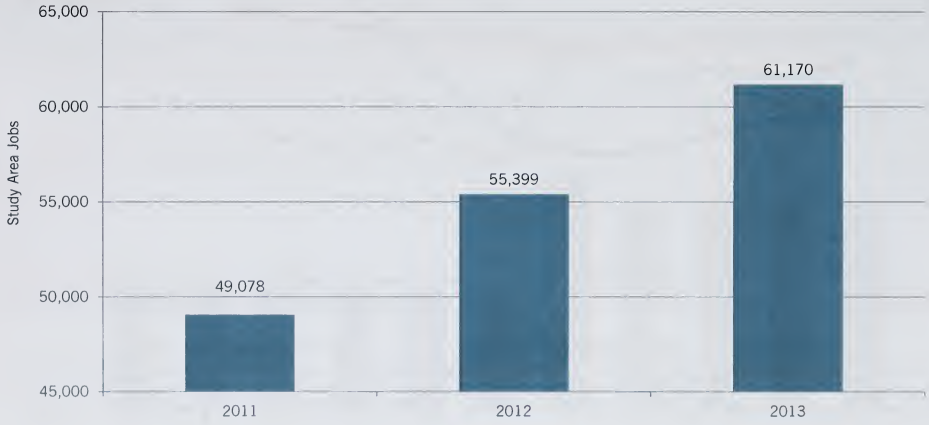
EMPLOYMENT



EMPLOYMENT

Study Area, 2011-2013

The Study Area has an increasing share of the City's total employment, growing faster than the City overall. The Study Area now accounts for 10% of the City's jobs. Since 2011 it is estimated that over 12,000 new employees have come to work in the Study Area (2013 average of approximately 61,000 employees up from the 2011 average of approximately 49,000). This does not account for even greater projected employment growth in the Study Area, as a large supply of renovated office space has become available for occupation within the last year.



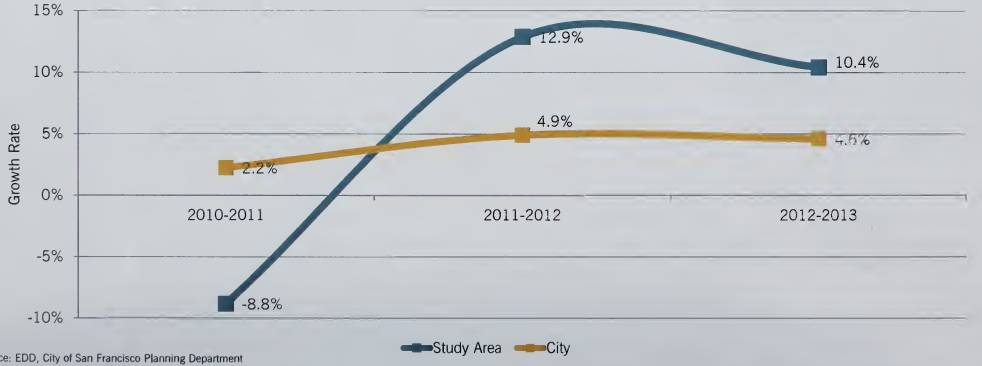
Source: EDD, City of San Francisco Planning Department

EMPLOYMENT

Growth Rates

From 2011 to 2013, employment growth rates have accelerated considerably in the Study Area and are well over the City's already robust employment growth. While the 12.9 percent growth rate between 2011 and 2012 was astonishing, this high level of employment growth was unsustainable. The Study Area was physically able to grow at such a rate due to high volumes of available office space, however as the commercial real estate market tightened between 2012 and 2013, this growth rate decreased slightly.

While the Study Area's growth rate dropped between 2012-2013, employment growth in the Study Area remains more than double the City growth rates. While data is not yet available, this trend is expected to have continued in 2014 as more renovated space became available.

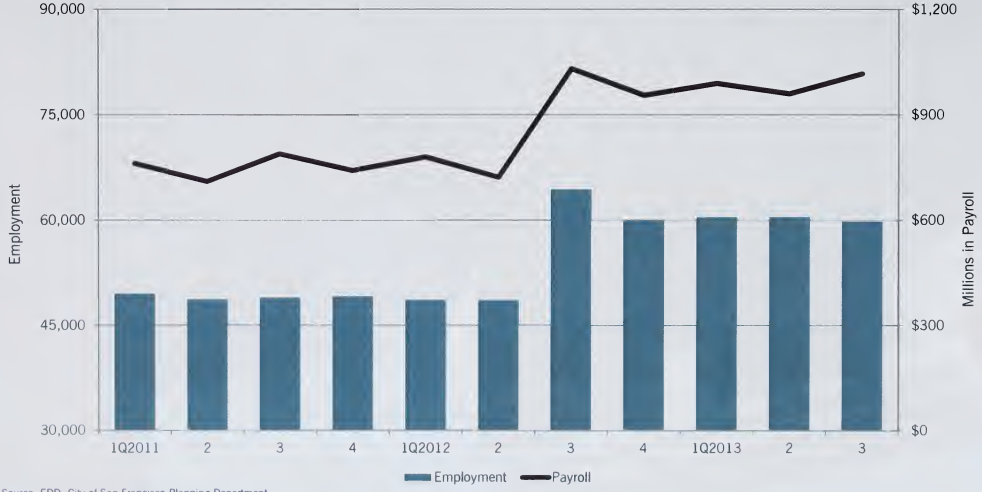


Source: EDD, City of San Francisco Planning Department

EMPLOYMENT

Quarterly Employment and Payroll

In addition to accelerating employment growth in the Study Area, there has been significant rise in payroll. From 2011 to 2013, payroll doubled in the Study Area. The growth rate of total payroll in the area (an increase of 48 percent) has also outpaced the growth rate of total employment in the area (an increase of 25 percent) over the two-year period. This indicates that the average income of employees in the area has increased as well as purchasing power among workers in the Study Area.



Source: EDD, City of San Francisco Planning Department

HOUSING

HOUSING

Purpose & Methodology

Analyzing housing stock in the Study Area allows us to begin tracking changes in the availability of affordable housing in the Study Area, as well as potential displacement from the changes in the housing market. Important metrics examined in this subsection include:

- Housing Affordability metrics. This study utilizes the following typology, created by OEWD and Planning:
  - Market Rate Units. These units are considered the least affordable.
  - Rent Stabilized Units. Rent Stabilized units are units that are potentially affordable based on projections from market rate rent increases by the San Francisco Rent Ordinance. This covers all apartment buildings built before June 13, 1979. Categories include:
    - Rent-controlled units
    - Private Single Room Occupancy (SRO) units. These types of units:
      - Typically include a single room with shared bathroom and sometimes a common kitchen
      - Are a form of affordable housing, often occupied by formerly homeless individuals
      - Are owned by for-profit entities
  - Permanently Affordable units are units that have rents that are permanently set at rates intended to be affordable to low and middle income individuals and families. Categories include:
    - Non-Profit SROs
      - Includes SRO buildings owned by non-profit entities and those owned privately but under a nonprofit master lease as part of a City subsidy
    - Below Market-Rate Units (BMR)
      - Inclusionary housing requirements; includes both for-rent and for-sale units that are priced at rates intended to be affordable to lower and middle income households
    - Other Affordable Housing
      - Includes non-profit owned (non-SRO) buildings and San Francisco Housing Authority (SFHA) public housing units. Does not include Section 8 units, for which the data was not available at our Study Area level.
- No-fault evictions – including demolition, owner move-in, Ellis Act withdrawal, capital improvements, conversion to condominiums, and substantial renovation – which provides an approximation of displacement in the area. (Note that the other types of evictions, for fault and nonpayment, are largely a function of the fragile population in the neighborhood and are a focal point for interventions, i.e. supportive services).

HOUSING

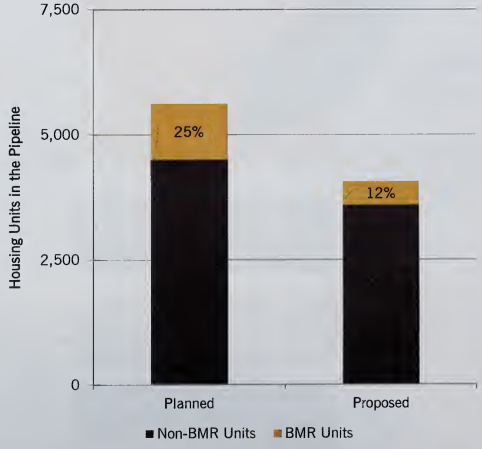
Pipeline

The area is projected to add approximately 9,700 housing units within the next ten years with more than 5,600 units likely to come online within the next five years. Of the 5,600 units in the Study Area near-term pipeline (under construction or approved), almost one in five are BMR units. This will add approximately 1,100 low and moderate-income units to the Study Area. The result of the pipeline volume will be an increase in the share of market rate housing in the neighborhood, as well as additional permanently affordable housing options for low- and moderate-income households.

Additionally, 4,000 more units are proposed in the next 10 years. The higher proportion of City pipeline in the Study Area (20 percent) indicates intense demand for housing in the area. This increase in market-rate units in the neighborhood and in the City may help to take pressure off of the existing stock.

	Study Area, All	Study Area, BMR	City, All
Planned	5,625	1,124	38,300
Under Construction	*3,724*	*666*	*4,600*
Approved	*1,901*	*458*	*33,700*
Proposed	4,069	477	10,900
Total Pipeline (Planned & Proposed)	**9,694**	**1,601**	**49,200**

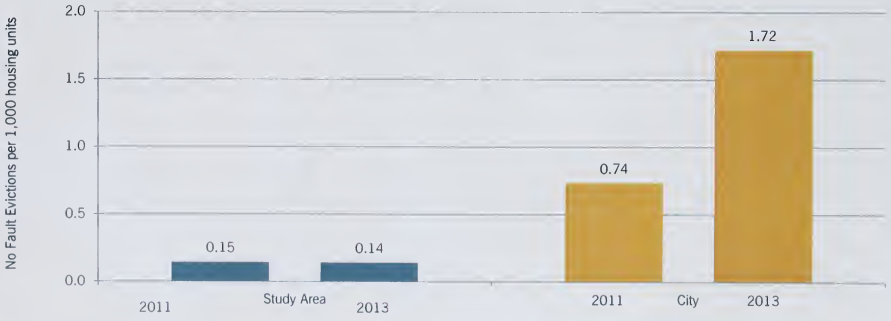
Source: City of San Francisco



HOUSING

No-Fault Evictions

No-fault evictions are instances where a tenant is displaced due to no fault of their own. No-fault evictions in the City in 2013 increased by over 2.6 times the rate of no-fault evictions in 2011, while rates in the Study Area did not rise at all. Rates in the Study Area are a fraction of what is taking place in the City, this is possibly due in part to the substantial amount of permanently-affordable housing managed by nonprofit or public landlords and to the fact that the larger size of apartment buildings in the Study Area tend to not lend themselves to speculation. No-fault evictions include: demolition, owner move-in, Ellis Act withdrawal, capital improvements, conversion to condominiums, and substantial renovation.



Source: Department of Public Health

DEMOGRAPHICS

DEMOGRAPHICS

Residents and Households

The Study Area accounts for approximately 5 percent of the City's total population but is poised to become a larger share due to the significant housing construction in the area. In general, households are smaller than the City overall which already has a small average household size compared to the nation. This is likely a result of the significant proportion of single room occupancy units in the area. Still, there are approximately 4,600 family households in the Study Area. When considering population density, the Study Area has more than double the families per square mile than the City overall, meaning the intensity of families and families with children exceeds many other neighborhoods in San Francisco.

	Study Area	City	Share of City
Population	38,800	815,000	5%
Average Household Size	1.81	2.35	NA
Families in Households	4,559	151,029	3%
Percent of Families in Households	*23%*	*30%*	*n/a*
Concentration of families, per square mile	*6,704*	*3,220*	*n/a*

Source: Census 2010

DEMOGRAPHICS

Age and Race

The Study Area has a higher population of minority residents than the City While proportionally the Study Area has similar amounts of children and seniors as the City, when accounting for population density, the density of children under the age of 19 is more than double the Citywide average density. In addition, the density of seniors in the Study Area is three times higher than the City. This means quality of life improvements can have a considerable positive impact on vulnerable low-income populations, especially those low-income households with children or seniors.

	Study Area	City
Age		
Population Under 19	4,000	128,000
Percent of Population Under 19	11%	15%
Population over 65	4,600	112,000
Percent of Population over 65	13%	14%
Children and Senior Density		
Population Under 19 / Square Mile	6,600	2,600
Population over 65 / Square Mile	7,600	2,400
Race/Ethnicity		
Black Alone	12%	6%
Asian or Pacific Islander Alone	30%	32%
Other Race Alone	11%	7%
Percent Minority (Non-white alone)	60%	50%
Two or more races	5%	4%
Hispanic/Latino/Spanish Origin (Any Race)	22%	14%

Source: Census 2010

DEMOGRAPHICS

Recent Population

The population of the area is rapidly changing through addition of housing units either recently delivered or under construction. It is estimated that over 1 in 7 new residents in the City now live in the Study Area.

The Study Area accounts for 15 percent of Citywide population growth, compared to the 5 percent of San Francisco residents residing in the Study Area in 2010. Note that approximately 20 percent of the population moving into the recently constructed housing units will be low- and moderate-income persons taking advantage of available below market rate (BMR) units delivered with new housing developments.

	Study Area	City	Share of City
Estimated New Residents, 2010-2014	1,070	7,090	15%

Source: Census 2010, AECOM

DEMOGRAPHICS

Income and Poverty

While some of the socio-economic data for the Study Area does not reflect new tenants that moved in since 2010, the Study Area will continue housing extremely low- and very low-income populations. The preponderance of housing units remains rent stabilized with a sizeable share directly subsidized. As a result, the population contains some of the highest concentration of low-income residents in the City.

- *Median Household Income.* The median household income is one-third that of the city as a whole. At $24,600, more than half of the households would qualify as extremely low- or very low-income defined as 30% and 50% below median household income. In other words, more than half of the households in the Study Area would qualify for subsidized housing, be it through a tax credit project, Section 8, BMR, or other program.
- *Households with incomes below $15,000 per year.* This population is considered extremely low-income and is vulnerable to homelessness and economic isolation. The Federal Poverty Level for a two person household is approximately $15,900. Three times as many households in the area live below the poverty level. It is likely that a larger share are living in subsidized units available through the City and its non-profit housing providers.
- *Labor Force Participation.* This rate indicates the percentage of the population that is older than 16 and younger than 66 that are working or looking for work. A lower percentage of people in the area participate in the labor force. A higher population of "discouraged workers", defined as those that are not actively seeking employment or those that are unable to find employment after long-term unemployment, could contribute to a lower labor force participation rate in the Study Area.

	Study Area	City
Median Household Income	$24,600	$76,100
Households with income below $15,000/year	31%	10%
Labor Force Participation Rate	54%	66%

Source: Census 2010, ESRI

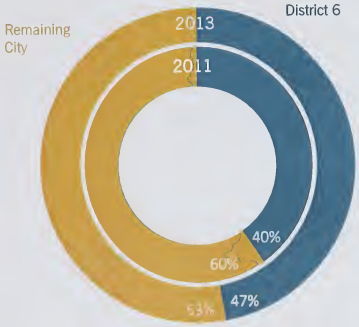
DEMOGRAPHICS

Homeless Population

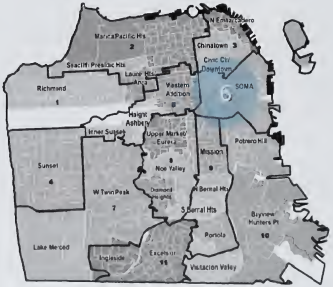
The Study Area is located within Supervisor District 6 (which also includes SOMA). As of 2013, almost half of the City's counted homeless population lived in District 6. The chart shows homeless counts for District 6 and the City overall.

Based on homeless counts in 2011 and 2013, the homeless population has experienced a slight increase in District 6 despite a small decrease in homelessness for the City overall.

Location of Homeless Individuals



Map of Supervisorial Districts



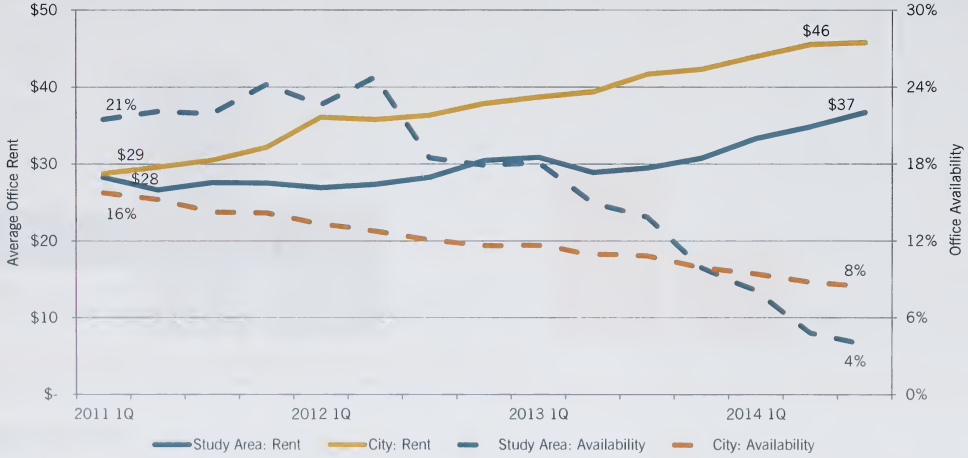
Source: City and County of San Francisco, Homeless Count Reports 2011 & 2013.
[illegible], Map from sfgov2.org

REAL ESTATE

REAL ESTATE

Office Market

Availability of office space in the Study Area has dropped considerably from a high of 25 percent to a low of 4 percent. The upward rise in office lease rates aligns with the City but the drastic decrease in availability has led to continued investment in the Study Area, especially along Market Street. Additional properties are under renovation and will provide additional availability, but leasing activity remains robust with less than 7 months of supply available before all space is completely occupied.



Source: CoStar

REAL ESTATE

Office Market

Significant price escalation has occurred in the Study Area for office space. Office sales prices in the Study Area have increased in response to decreased availability (now at 4 percent) and increased lease rates (of $9 PSF).

Transaction prices in the Study Area have increased by 122 percent from 2011 to 2014 compared to a 100 percent increase for San Francisco overall, but they still remain lower than the City average despite that increase.

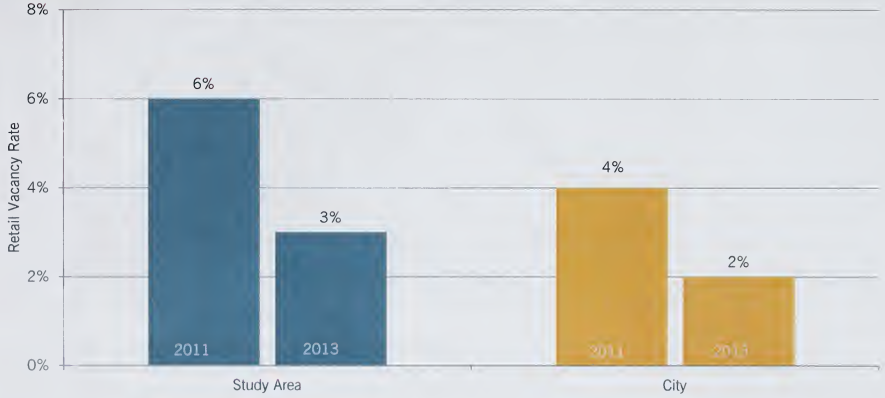
Year	Volume Transacted (SF)	Study Area Avg. Sales PSF	City of SF Avg Sales PSF
2011	1,272,000	$240	$275
2012	1,143,000	$296	$475
2013	245,000	$398	$400
2014	336,000	$532	$550

Source: CoStar

REAL ESTATE

Retail Market

In addition to the drastic improvement in office conditions, retail vacancies have dropped in the Study Area in line with the City decrease in retail vacancies. The Study Area realized $40 million in additional taxable sales during the same period but much of those gains were from non-retail outlets (i.e. sales realized from businesses that do not have a physical storefront in the traditional sense). Thus, storefront retail activity has lagged behind the exponential growth in office activity within the Study Area.

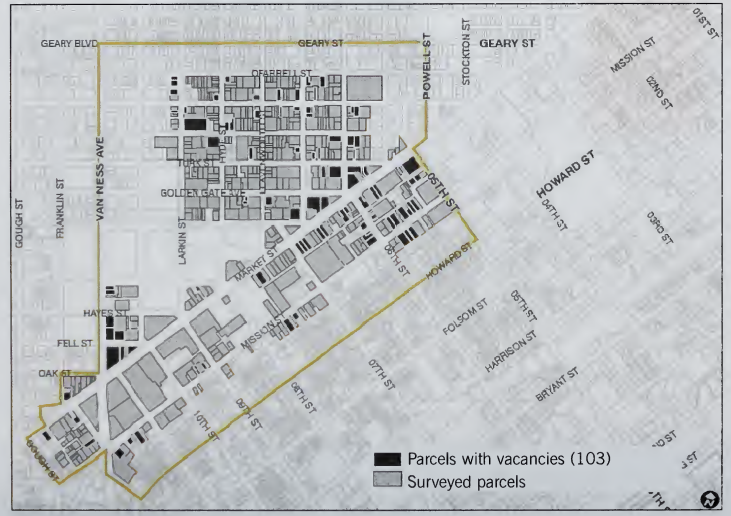


Source: CoStar

REAL ESTATE

Retail Market Vacancies Map

Despite decreasing vacancy rate and increased demand for commercial space in the study area, many vacancies were still identified in 2014 through a walking parcel inventory. Further, the number of vacancies is likely higher than 103, as the parcel inventory did not cover the entire study area. Identified vacancies will be tracked over time to determine priorities for business attraction and to understand how the growth in office employment and resident population will impact retail vacancies.

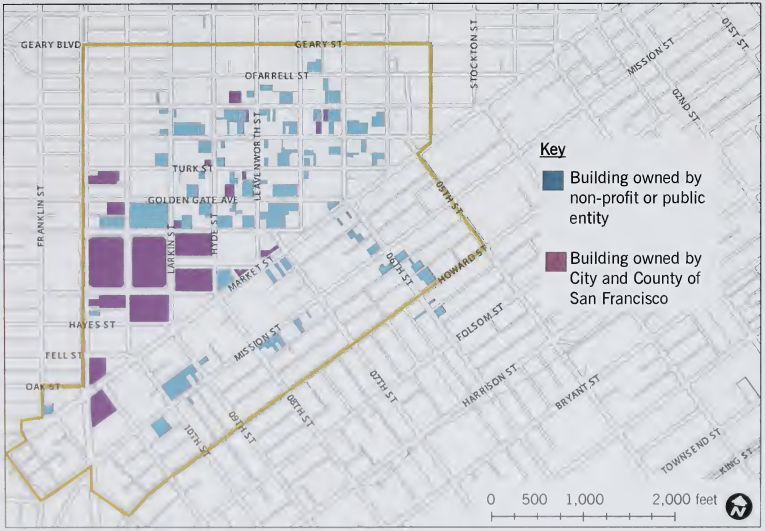


Source: San Francisco State, 2014 Study, verified by City of San Francisco Planning Department

REAL ESTATE

Non-profit or Public-owned Properties

Significant supply (approximately 12 percent) of public-owned and non-profit owned parcels mitigate turnover of properties in the Study Area in the face of rising price pressures and potential speculation. It also serves to provide rent stabilization for commercial property enabling lower revenue non-profit tenants to maintain their operation within the Study Area.



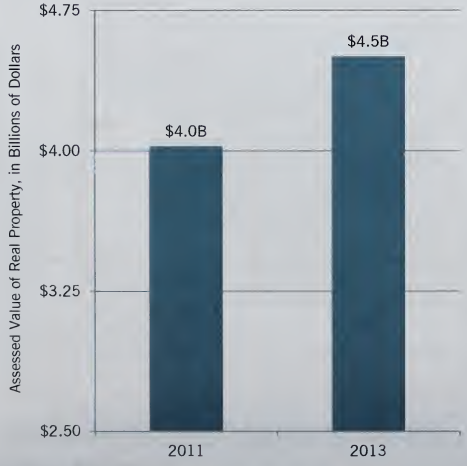
Source: 2013 assessment databases from Central Market CBD, Tenderloin CBD, and Civic Center CBD

REAL ESTATE

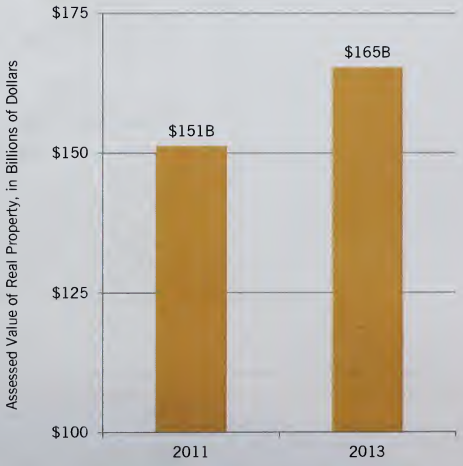
Assessed Property Value Increases

As values of assessed real estate increase, taxes collected for the General Fund increase as well. With a number of new housing units in the pipeline and space renovations under way, the Study Area is likely to experience even more growth in property values in 2015 and 2016. Just within the two year period, property tax contributions have increased by 13 percent compared to 9 percent for the City overall. This does not account for additional gains in property transfer tax, transient occupancy tax, or sales tax which also contribute to the City's discretionary municipal revenue. In short additional City investments in the area will only further boost the Study Area's fiscal contribution to the City.

Study Area



City of San Francisco



Source: City of San Francisco Comptroller and Assessors Property Roll

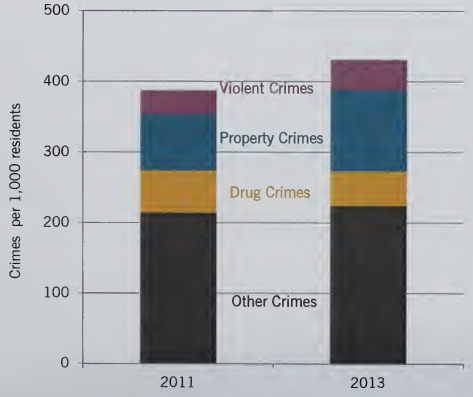
QUALITY OF LIFE

QUALITY OF LIFE

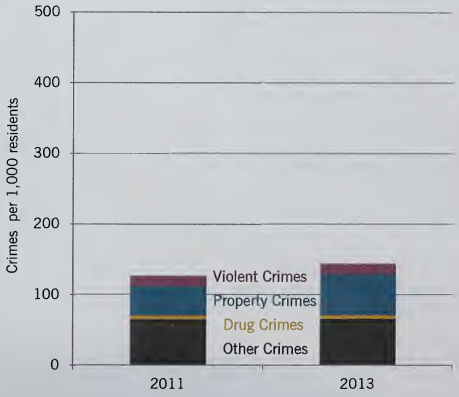
Crime Rates

Crime report information indicates a significant concentration of activity within the Study Area at more than three times the rate as the City of San Francisco overall. Of special concern is the higher incidence of drug crime and violent crimes. Crimes rates have increased citywide by approximately 14 percent since 2011 with a similar increase in the Study Area (11 percent).

Study Area



City of San Francisco



Source: San Francisco Police Department

QUALITY OF LIFE

Street Cleaning Requests

The volume of 311 requests for street and sidewalk cleaning indicates that the streets and sidewalks in the Study Area are much dirtier than elsewhere in the City. The volume of requests that require steamers to clean sidewalks of debris, feces, and urine is by far the highest in the City – the Study Area accounts for 22 percent of all 311 requests for sidewalk and street cleaning. Recent observations and data not yet available for 2014 indicates the portable monitored toilets are having a measurable impact on the cleaning requests.

Total Sidewalk and Street Cleaning Requests	Study Area	City	Share of City
2011	7,014	43,528	16%
2013	8,788	39,312	22%

Source: San Francisco DPW

QUALITY OF LIFE

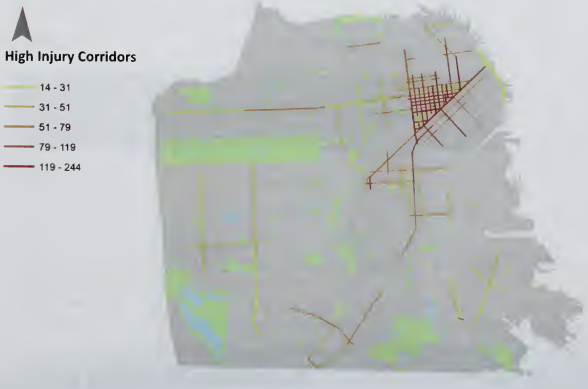
Pedestrian Injuries

As demonstrated on the map below, the Study Area contains a number of high-injury corridors, posing a threat to pedestrians. The concentration of these corridors in the Study Area suggest that walking in the Study Area is more dangerous than elsewhere in the City.

Central Market/Tenderloin

Citywide High Injury Corridors Map

Not to Scale



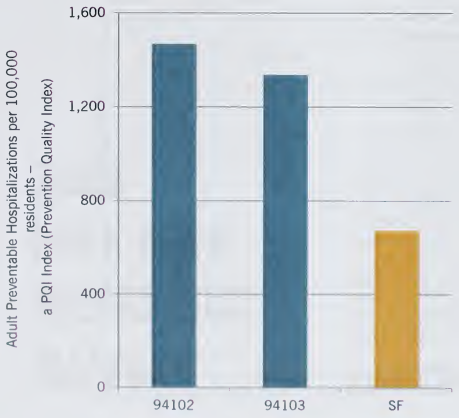
Source: San Francisco Municipal Transit Agency

QUALITY OF LIFE

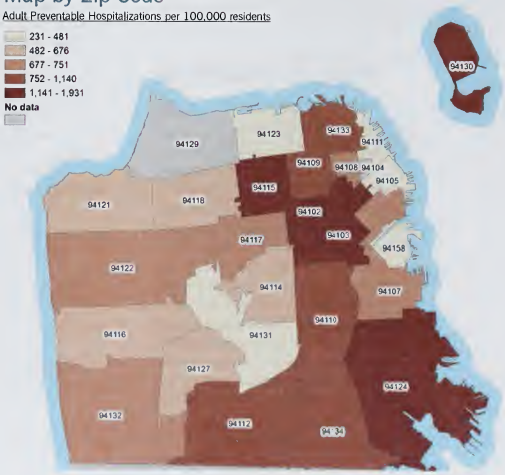
Age-adjusted Preventable Hospitalizations, 2010-2012

The Study Area is located within the zip codes 94102 and 94103 where the incidence of preventable hospitalizations is more than double the City rate. Preventable hospitalizations are admissions to hospitals for certain acute illnesses (e.g. dehydration) or worsening chronic conditions (e.g. diabetes) that might otherwise have been managed successfully through basic primary care. In this case, the incidence of preventable hospitalizations indicates a higher proportion of vulnerable populations within the Study Area that are not being effectively treated in an appropriate outpatient setting.

Study Area versus City



Map by Zip Code



Source: San Francisco Department of Public Health. Note map depicts preventable hospitalizations from 2009-2011 and should be used for illustrative purposes only. Source: http://www.sfindicatorproject.org/indicators/view/285

APPENDIX G: NEIGHBORHOOD PUBLIC REALM VISION

INTRODUCTION

The Central Market/Tenderloin Strategy began with exploring the current built environment and physical conditions in the neighborhood. A starting point for this exercise was to catalogue all of the public realm projects that are currently underway and planned for in Central Market and the Tenderloin. Collecting information from numerous City agencies and community stakeholders revealed the following:

- More than 20 near-term (within the next two years) public realm projects are currently underway in the neighborhood. These improvements address issues of pedestrian safety, sidewalk activation and place making.
- Over the next three to five years, numerous additional public realm projects are proposed for the neighborhood, including larger urban design initiatives, a pedestrian lighting installation and traffic calming measures.
- Some of these mid-term efforts will require additional funding and greater coordination to ensure that they are completed and leverage the Action Items called out in the Strategy.

After mapping and analysis of these near- and mid-term projects, the Planning Department, the Municipal Transportation Agency and the Department of Public Works are now beginning to pursue a more holistic, longer-term approach to public realm improvements in support of the Strategy's goal – to create a diverse, healthy, mixed-income neighborhood where safety and well-being are within reach of all who live and work in Central Market and the Tenderloin. In particular, a long-term vision for public realm projects will be instrumental in creating streets and public spaces that are safer, more comfortable and feel welcoming to all.

OPPORTUNITY FOR CHANGE

The opportunity to re-envision the Central Market/Tenderloin public realm is borne out of a confluence of economic and policy conditions, presenting an opportune moment for action:

- *Tremendous economic growth in Central Market.* The influx of thousands of new jobs and housing units, along with new arts venues and retailers over the past several years, brings new resources and

energy to the neighborhood, along with a call for City leadership to address community needs that have yet to be met.

- *Adoption of the Vision Zero Policy.* In 2014, the SFMTA Board joined the San Francisco Board of Supervisors, SF Planning, SFDPH and multiple other city agencies in adopting a policy to eliminate all traffic deaths in the City by 2024. The Tenderloin's high volume and multi-lane streets put its seniors, low-income residents, people of color, people with disabilities and other vulnerable populations reliant on walking and public transit at especially high risk for traffic-related injury and death. (See: http://visionzerosf.org/about/support-for-vision-zero/, links to all agency resolutions are at the bottom of the page.)

- *Better Market Street (BMS).* This major capital project involves a comprehensive rethinking of how Market Street functions. It will reconstruct Market Street from Octavia to the Embarcadero starting in 2019. BMS will address circulation (how people can comfortably efficiently and safely move through and across Market Street), the physical design of Market Street's sidewalks and plazas spaces. The project will influence circulation patterns in adjacent neighborhoods like the Tenderloin, and has the potential to improve connectivity between the Tenderloin and nearby neighborhoods.

- *Excess capacity within the Tenderloin street network.* Most streets in the Tenderloin seem overbuilt, designed to accommodate more cars than can actually use them. While further research is needed to verify this observation, there may be opportunities to make pedestrian safety improvements that reduce traffic capacity without significantly impacting mobility in the neighborhood. The San Francisco County Transportation Agency's (SFCTA) Tenderloin-Little Saigon Neighborhood Transportation Plan published in 2007 outlined numerous opportunities for transportation improvements in the neighborhood like converting 1-way streets to 2-way streets, installing pedestrian bulb-outs and simplifying the Muni routes in the neighborhood. The Eddy and Ellis Street 2-way conversions and recently completed intersection daylighting projects were the first projects to come out of this planning effort.

- *California Environmental Quality Act (CEQA) reform.* The Governor's Office of Planning and Research is currently developing a new standard for evaluating proposed transportation projects, which is expected to significantly reduce the time and cost for implementing sustainable and safe transportation projects.

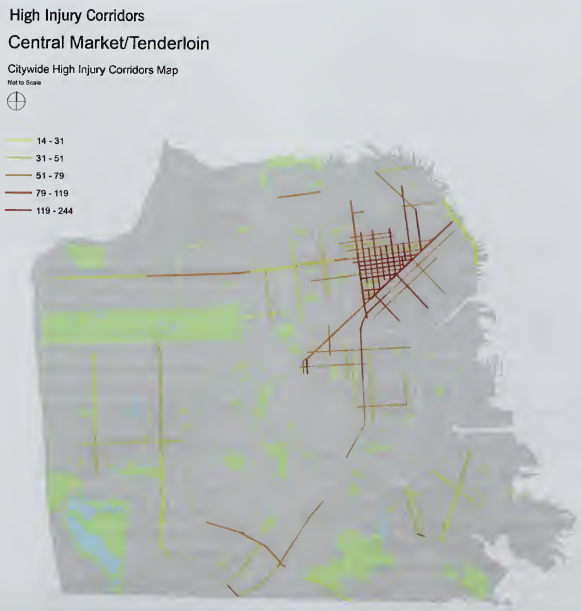
- *The City's recent pioneering of innovative and low-cost design and place making tools.* San Francisco is a laboratory for innovation, and the City is constantly testing and adapting new urban design initiatives to improve the quality of our streets for everyone.

PUBLIC REALM VISION FOR CENTRAL MARKET/TENDERLOIN

Crafting a long-term vision for the neighborhood's public realm will require engineering solutions that reduce the likelihood of people being hit by cars. It will also require interventions that increase people's comfort and safety the neighborhood. Both approaches are essential to achieving the vision established in the Central Market/Tenderloin Strategy – a neighborhood of safe, clean spaces where everyone feels welcome. Over time, these complimentary strategies will to contribute to the Tenderloin's identity and sense of pride, fostering social cohesion among the diverse residents and denizens who call the Tenderloin home.

Pedestrian Safety

The streets in the Tenderloin and surrounding neighborhoods have among the highest concentrations of pedestrian injury in San Francisco. The reason for the high collision rate stems from the design of the streets themselves. Unlike other San Francisco neighborhoods where slower two-way residential streets prevail, most streets in the Tenderloin are three-lane, one-way streets. This pattern results in wider streets



Tenderloin streets have a higher number of pedestrian injuries when compared to streets in other San Francisco neighborhoods.

with faster moving traffic creating longer crossing distances for pedestrians, and increasing their exposure to moving vehicles. These conditions in a community where there are high numbers of residents who are seniors, people with disabilities, and low income residents reliant on walking and transit contribute to high numbers of preventable injuries and deaths on our streets.

The Tenderloin's current street system was designed to shuttle cars between downtown San Francisco and neighborhoods to the west. Ironically, due to its dense housing stock, relatively low supply of off-street parking and neighborhood demographics, the Tenderloin has the lowest rate of car ownership in the city. In other words, the streets in the Tenderloin are designed to move traffic through the neighborhood at the expense of the people who live there.

The High Injury Corridors shown on the map above represent 6 percent of San Francisco's street miles, but 60 percent of severe and fatal injuries. These Corridors were analyzed and mapped through the City's Walk First project and highlight those streets where high numbers of pedestrian injuries occur. The Tenderloin is unique among San Francisco neighborhoods in that, with the exception of alleyways, every street in the neighborhood has been identified as High Injury Corridor. To learn more, see: walkfirst.sfplanning.org and visionzerosf.org.

The scale of the pedestrian-safety problem in the Tenderloin dwarfs that of other San Francisco neighborhoods, both in terms of the volume of people injured annually, as well as the number of street segments that will need to be modified in order to improve current conditions. There are approximately 40 blocks in the Tenderloin and (depending how one counts) roughly 100 street segments. In an era when streetscape improvement projects can easily cost millions of dollars per block and take years to complete, how can we address this problem without breaking the City's capital budget?

With Vision Zero, the City of San Francisco has embraced a policy framework that prioritizes human safety in transportation decision making processes. And because the Tenderloin streets have among the highest concentrations of pedestrian injuries, the neighborhood is starting to receive a heightened level of attention. Recent SFMTA projects, such as daylighting intersections (removing street parking at the corner to improve pedestrian visibility) and installing pedestrian count-down signals and crosswalk enhancements, are welcome improvements that will help cultivate a safer pedestrian-friendly environment.

However, these near-term projects represent only the first wave of pedestrian safety improvements that will be necessary to achieve the City's goal by 2024. The Tenderloin's streets system was designed half a century ago and no longer meets the neighborhood's needs, nor reflects the City's values (e.g. Better Streets Policy, Complete Streets Policy, Transit First Policy or the NACTO Urban Street Design Guidelines). Reducing the pattern of traffic collisions in the Tenderloin will ultimately necessitate a more holistic and systematic restructuring of the neighborhood's transportation system. The opportunity now exists to reimagine a streets system for the Tenderloin that reflects current City policies and transportation needs, while acknowledging the dynamics and character of the Tenderloin as its own distinct neighborhood.

Let Them Use Paint

While the challenge seems daunting, it is not insurmountable. Improving the pedestrian environment in the Tenderloin in a timely and cost-effective way will require a new approach to street design in San Francisco. It will necessitate a rethinking of the City's internal processes for delivering streetscape improvements, as well as a willingness to experiment and innovate with the methods and materials of the improvements themselves.

Fortunately, over the past few years San Francisco has begun to experiment with new low-cost/low-risk models for designing streets through programs such as the City's Pavement to Parks program, SFMTA's temporary painted bulb-out program, and OEWD's Plaza Program. Through these initiatives, the City has gained a much more sophisticated understanding of, and approach to, the technical, regulatory and maintenance issues inherent to this new generation of lighter infrastructure.

To date, the execution of these programs in San Francisco has been largely opportunistic. Scaling this approach to the neighborhood level offers a path toward addressing the transportation system in the Tenderloin within a more reasonable budget and timeline. Using paint as a place making tool has several advantages over conventional methods in that it is fast, cheap and adaptable.

A planning process of this scale will necessitate a coordinated effort across several City departments to execute. For traffic changes, Planning, SFMTA, and Public Works will work together to perform analysis, craft a vision, draft a plan, and conduct community outreach. Reconfiguring the streets will also require engineering and design work to ensure the ideas generated in the plan are feasible. To date, through the Central Market/Tenderloin Strategy Public Realm Subcommittee, City agencies have initiated discussions around developing formal work plans, scope and budgets for this effort

Decorative sidewalk and painted crosswalk at Persia Triangle Pavement to Parks Plaza. September 2014.

Although further scoping and additional study is required, the following steps outline a rapid, action-oriented approach for the Tenderloin

- *Research travel patterns.* The City needs accurate traffic count, bike count and pedestrian volume data in order to make informed decisions about the Tenderloin, yet much the existing data is out of date. The City should start by measuring traffic volumes in the neighborhood.
- *Convert three-lane, one-way streets to two-lane, one-way streets.* As an interim step to improving pedestrian safety, reducing the number of lanes pedestrians must cross limits exposure to moving vehicles and reduces traffic speed. This step would not require expensive signal work and can be deployed relatively quickly cheaply using paint. In cases where the change in Level of Service (a measurement of vehicle delay) is minimal, a full Environmental Impact Report would not be required, enabling some streets to be converted relatively quickly. Other streets with higher traffic volumes will necessitate further study. Over time, as funding becomes available, the City may

explore more expensive treatments like 2-way operations and sidewalk widening along these corridors.

- *Focus on signals.* Instead of spending limited funds for a few blocks of sidewalk widening, the City should spend strategically to build the signal infrastructure to convert one-way streets to two-way streets on key streets identified in the SFCTA's 2007 Tenderloin-Little Saigon Neighborhood Transportation Plan. Two-way traffic operations on key streets would enable significant improvements to the Muni and bike networks in the neighborhood, as well as calm traffic and improve pedestrian conditions.

- *Repurpose space to encourage walking and biking.* Once car lanes are removed, the space will need to be reprogrammed. Despite its street pattern which prioritizes car traffic, the Tenderloin has a high walking and biking rate relative to other San Francisco neighborhoods. Painted sidewalks, bulb-outs, bike lanes, and plazas are low cost treatments that can improve pedestrian safety by visually narrowing the right-of-way, while adding amenities for people walking and biking.

- *Improve Muni legibility.* The pattern of one-way streets in the Tenderloin forces bus routes to be split on parallel streets. This makes the bus system more complex, and difficult to navigate. For this reason, transit planners typically prefer routing bus lines on two-way streets where buses can travel each direction on the same street. The Tenderloin-Little Saigon Neighborhood Transportation Plan also identified several opportunities for two-way conversions as a means to simplify Muni routes. Some of these changes will require relocation of the overhead contact system wires.

- *Incrementally widen sidewalks over time.* While the City will likely start with paint and signals, reclaimed pedestrian space ultimately should be replaced with more durable materials that are easier to maintain. This outline should be considered a stepping stone to a more permanent landscape. City leadership should commit to allocating a dedicated funding stream to sidewalk widening in the Tenderloin with a goal of replacing painted sidewalks in the neighborhood with curbed sidewalk extensions over the next 10-15 years.

Enhance the Public Spaces and the Built Environment

The Tenderloin's public life and character are heavily impacted by the transportation system, but other factors in the built environment influence people's experience of safety as well. Changes to public spaces can promote positive sidewalk activity and create attractive and welcoming spaces for all. One advantage of including public realm planning within the broader Central Market/Tenderloin Strategy is the opportunity to integrate these place-based initiatives with other programmatic efforts highlighted in the Strategy.

When choosing place-based activities to pursue as part of the larger Strategy, the City should focus its efforts on interventions that enhance the built environment, especially public spaces. The integration of arts and culture in these projects—such as partnering with neighborhood arts organizations and commissioning artists to paint crosswalks, murals, or street furniture—is an opportunity. Cumulatively, the following interventions can foster

community pride and neighborhood identity

Enhance Public Spaces

- *Installation of Living Innovation Zones, Parklets, Bus Bulbs and Temporary Art.* The City has pioneered various place-making tools that, when well designed, can act as magnets for positive activity. Neighborhood public realm projects might include parklets, public art and similar interventions. These types of investments typically work best when there is an active adjacent land use, such as a coffee shop or museum, to help program and watch over the space, while encouraging pedestrian activity.
- *Attention to street trees.* Trees are one of the most important elements of the street environment. Planning and urban design efforts should include infill tree planting and improved tree maintenance. Some trees in the Tenderloin, for example, are overgrown, darkening the sidewalk at night.
- *Implementation of Green Connections.* The density of children living in the area is more than double the citywide average, while the density of seniors is three times higher. The Planning Department's Green Connections Plan recently developed a concept design for the Tenderloin Safe Passages walking path linking Boeddeker Park, the Tenderloin Children's Playground, the Tenderloin National Forest, and UN Plaza with an improved pedestrian plaza at Market and Jones Street. Now is an ideal time to implement and develop a strategy for maintaining and programming the space.

Enhance the Built Environment

- *Promotion of historic resources.* The Tenderloin is home to some of the city's oldest buildings and architectural treasures, but many have faded into the landscape and are in need of maintenance. Restoring and showcasing these buildings can provide a stronger sense of place and neighborhood identity, while protecting our city's architectural heritage. For example, a City-sponsored initiative for uplighting historic building facades could highlight the Tenderloin's architectural treasures while also increasing pedestrian comfort and safety at night.
- *Activation of Building Storefronts.* Zoning can be a powerful tool for shaping the built environment, and in some instances is the only means to achieve certain outcomes. While a comprehensive rezone of the Tenderloin is not currently under consideration, the neighborhood's zoning has not been updated in decades and may require targeted refinements to meet current neighborhood needs. For example, many building facades and storefronts lack transparency to the street, particularly in the case of ground-floor medical uses and social service providers. Strategic tweaks to the zoning code are one way to encourage more active, public-facing storefronts. This strategy wouldn't necessarily impact existing tenants but would influence future development in the neighborhood, and, over time, these kinds of strategic zoning changes can have a significant impact on the neighborhood character and may reduce crime by increasing eyes on the street.

CONCLUSION

The public realm vision articulated in this document is ambitious – the spatial scale of the proposed plan area is large and some of the methods being considered are unconventional. The Central Market/Tenderloin neighborhood is a diverse community facing new demographic pressures, compounded by old socio-economic challenges. Yet maintaining the status quo is unrealistic; this city can, and should, do better.

Challenges aside, the time is ripe for a bold planning agenda. The Central Market/Tenderloin neighborhood has a dense mix of community-based organizations, including both social service providers and arts organizations that are mobilized and inspired to better the quality of life for residents and workers. The community is experiencing an influx of private sector investment with new employees and residents who are eager to contribute.

The City recognizes this building momentum. The Central Market/Tenderloin Strategy provides an organizational framework for harnessing this energy and coordinating it for the betterment of the community. Strong City leadership will be required to realize this public realm vision and the subsequent projects outlined in this document. The City is ready to collaborate with the Central Market/Tenderloin community to realize this new public realm vison that prioritizes and values the health, safety and well-being of the people who live, work and visit the neighborhood.